

ALASKA VISITOR STATISTICS PROGRAM



ALASKA VISITOR ARRIVALS

FALL / WINTER 1993-1994

Department of Commerce & Economic Development
Alaska Division of Tourism
State of Alaska



JUNEAU • KETCHIKAN

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Introduction

Summary of Major Findings

Executive Summary

***Marketing Trends and
Implications***

Introduction

The *Alaska Visitor Statistics Program (AVSP)* was launched by the State of Alaska Division of Tourism in 1985. This ground-breaking visitor industry research program has been recognized as one of the most sophisticated among the 50 states. The McDowell Group, Inc. of Juneau and Ketchikan, Alaska was selected by the Division of Tourism to conduct the 1993-94 study. This firm was also the program contractor in 1989-90 and in 1985-86.

Tourism continues to be an industry of growing importance to the state. Once regarded as a stepchild of the major traditional resource industries, tourism's tremendous growth in the past ten years has given it legitimacy as a major industry. The *AVSP*, now in its third incarnation, is a critical link in understanding the Alaska tourism market. This program provides detailed information about visitors to the state so that government and industry can channel their marketing and development efforts in the most productive fashion.

The *AVSP* program consists of sampling arriving visitors for the period of one year by personal intercept interview, an expenditure diary survey, and a follow-up mail survey. The methodology developed by the McDowell Group has consistently yielded national records in response rates for visitor survey research: 96% for the personal intercept survey, 52% for the diary and 50% for the comprehensive mail survey for Fall/Winter 1993-94. These response levels are slightly less than in previous years.

A series of six comprehensive reports result from these surveys. This report, *Alaska Visitor Arrivals, Fall/Winter 1993-94*, is the fourth in the *AVSP III* series.

The program has four distinct but interdependent phases. These are the *Arrival Count*, *Random Arrival Survey*, *Visitor Expenditure Survey*, and *Visitor Opinion Survey*. The exhibit and map on the following pages show the survey locations and program phases.

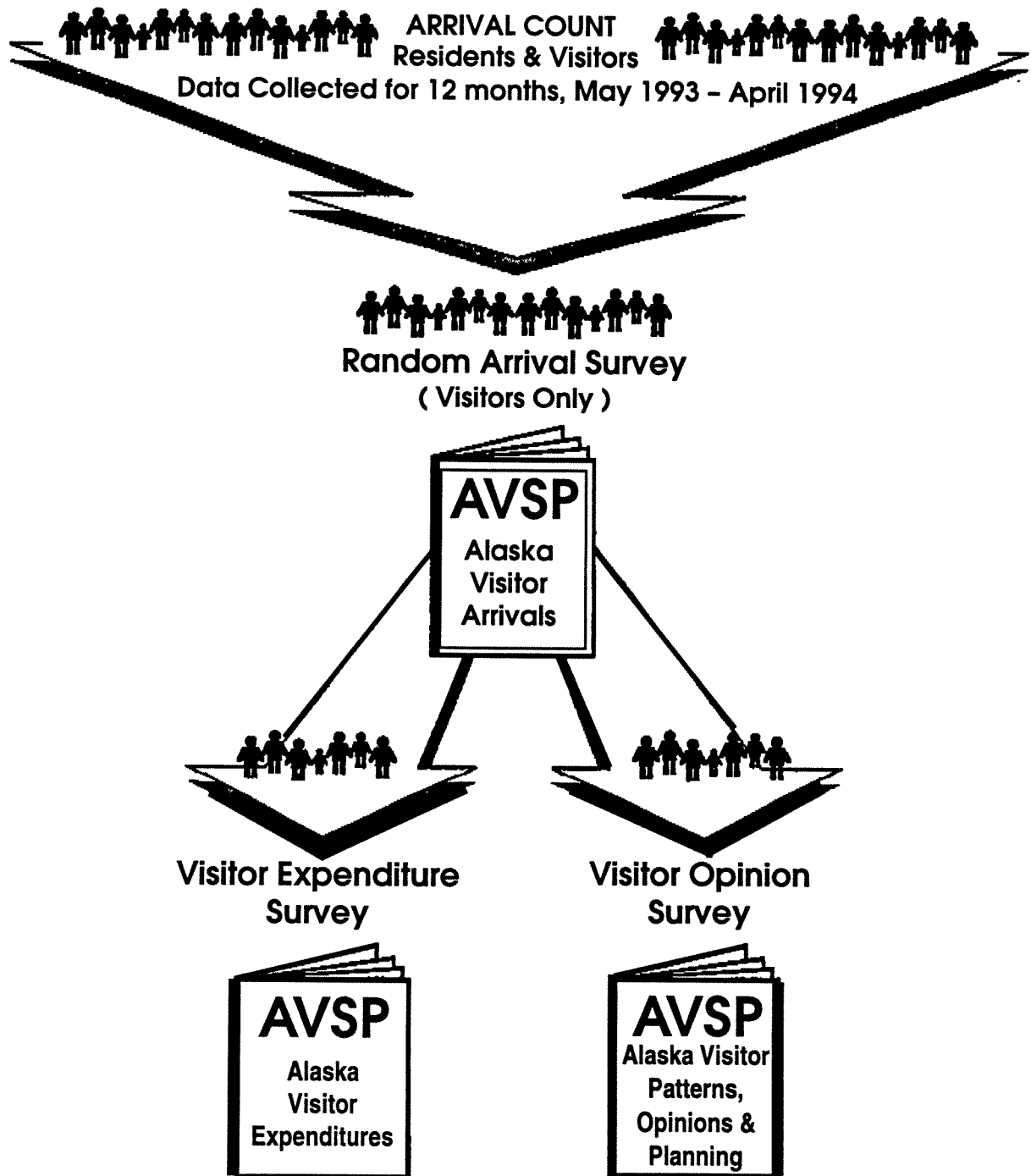
Alaska Visitor Statistics Program III Phases

<i>Phase</i>	<i>Description</i>	<i>Purpose</i>
1. Arrival Count (AC)	Secondary research collection of data on all passengers arriving in Alaska at their first points of entry.	To quantify the number of visitors and residents entering the state by each mode, using ratios found in the RAS phase, below.
2. Random Arrival Survey (RAS)	Personal intercept interviews with a scientific sample of visitors at their first point of entry.	To determine composition of visitors including their trip purpose, modes of entry/exit, origin, age, party size, gender, and travel type. To measure resident/visitor ratios for each entry mode for expansion to Arrival Count data. To collect names and addresses for VOS mail out survey. To administer VES diary to arriving visitors.
3. Visitor Expenditure (VES)	29-day expenditure diary booklet distributed on arrival to every other RAS respondent.	To provide visitor expenditure survey data by detailed category and by region and community.
4. Visitor Opinion Survey (VOS)	20-page survey booklet with personalized cover letter from DOT Director mailed to every other RAS respondent (the half not receiving a diary) after their return home.	To assess visitor use of and satisfaction with statewide and regional facilities, accommodations, attractions, transport modes and activities. To determine visitor volume by community, region and attraction. To collect trip characteristics data. To collect data on the Alaska trip planning process, travel habits and demographics.

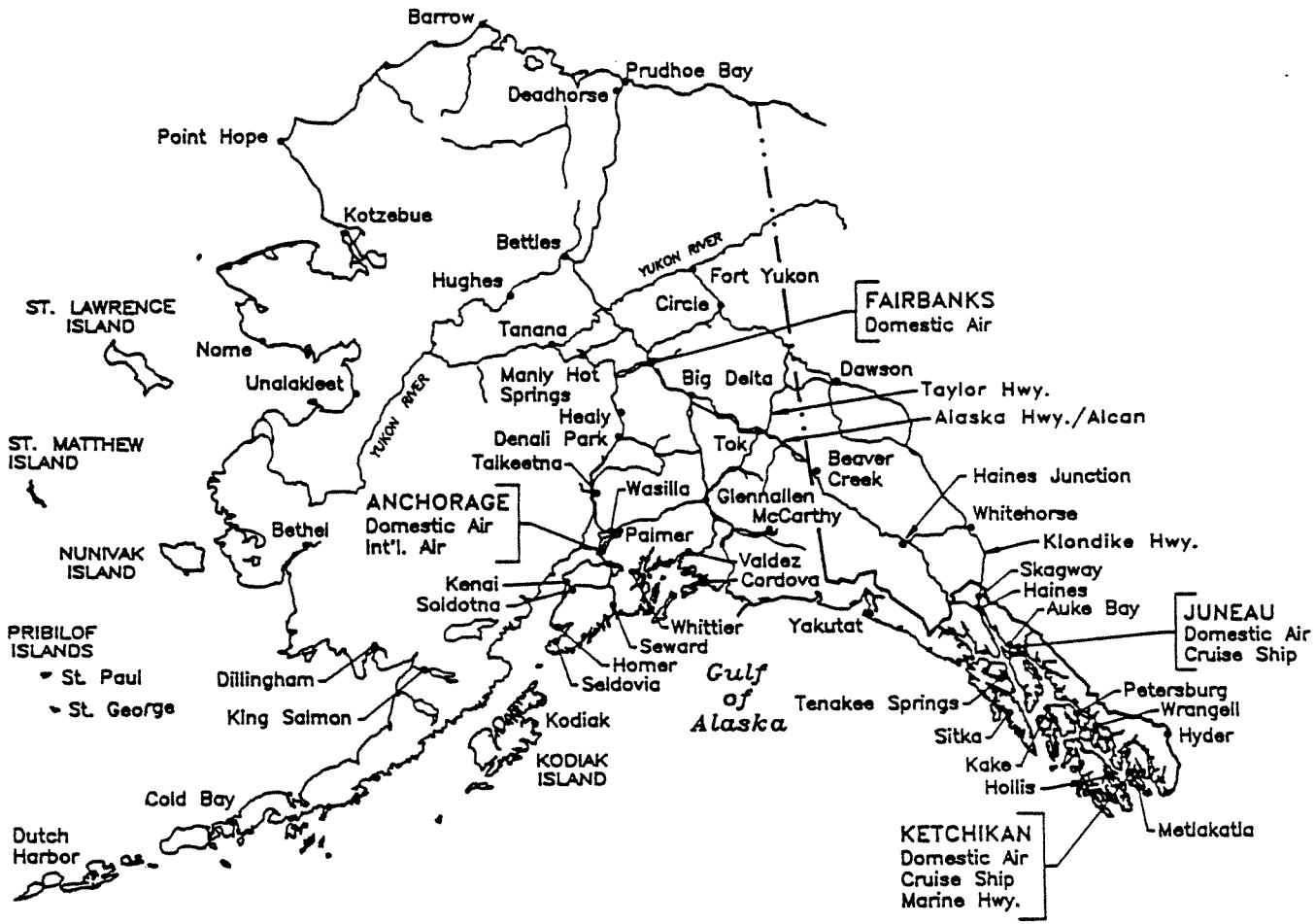
The six major reports generated as part of the program are:

<i>Report</i>	<i>Date</i>
1. <i>Alaska Visitor Arrivals, Summer 1993</i>	January 1994
2. <i>Alaska Visitor Expenditures, Summer 1993</i>	March 1994
3. <i>Alaska Visitor Patterns, Opinions and Planning, Summer 1993</i>	May 1994
4. <i>Alaska Visitor Arrivals, Fall/Winter, 1993-94</i>	October 1994
5. <i>Alaska Visitor Expenditures, F/W 1993-94</i>	November 1994
6. <i>Alaska Visitor Patterns, Opinions and Planning, F/W 1993-94</i>	December 1994

Alaska Visitor Statistics Program III Phases



THE



ENTRY TRANSPORTATION MODE

SURVEY LOCATION	Domestic Air	Cruise Ship	Highway	Marine Highway	International Air
ANCHORAGE	X				X
FAIRBANKS	X				
JUNEAU	X	X			
KETCHIKAN	X	X		X	
Alaska Hwy.			Auto		
Klondike Hwy.			Auto		
Taylor Hwy.			Auto		

NOTE:

NOTE: Marine Highway is sampled onboard vessels from Prince Rupert and Bellingham underway to Ketchikan. Alaska Highway is sampled at intersection of Taylor Highway and Alaska Highway near Tok. Klondike Highway is sampled at the U.S. Customs Service station at Skagway.

Reader Notes

Reader Notes are provided to help the reader better understand the unique features of the *Alaska Visitor Statistics Program* reports. Included are explanations of terminology and important background information on sampling techniques.

Terminology

RAS: (*Random Arrival Survey*) This was the actual visitor research survey used to generate the information in this *Alaska Visitor Arrivals* report.

Fall/Winter Season: The Fall/Winter/Spring Season for 1985 through 1992 was defined as October through May. For the 1993-94 *AVSP*, May was added to the definition of the Summer Season. Therefore, for *AVSP III*, the Fall/Winter Season has been defined as October through April. In order to compare 1993-94 results, 1989-90 data was adjusted to reflect October through April.

The Fall season included October, November and December. Winter season included January, February, March and April.

Summer Season: The Summer Season for 1985 through 1992 was defined as June, July, August and September. For the 1993-94 *AVSP*, May was added to the definition of the Summer Season.

Trend Tables: Chapters I and II include tables comparing Fall/Winter 1993-94 results with the results from 1989-90. Data from Fall/Winter/Spring 1989-90 has been adjusted to reflect the October to April season to allow for more accurate comparison between years. See sample below:

Total Arrival Trends by Entry Mode
Fall/Winter 1989-90 and 1993-94
Sampled Modes Only

	1989-90 ¹	1993-94	Total Change	Annual Average Change
Domestic Air	403,153	506,198	+25.6%	+5.9%
International Air	16,342	7,521	-54.0	-11.4
Highway-Personal Vehicles	35,183	30,104	-14.4	-3.4
Ferry	15,432	12,603	-18.3	-4.3
Total Sampled Modes	470,110	556,426	+18.4%	+4.3%

¹ Fall/Winter 1989-90 data was adjusted to the October to April season of Fall/Winter 1993-94 to ensure comparability.

Total Arrivals: This is the number of all arriving passengers, both residents and visitors, entering Alaska during the summer season. Arrivals were counted at their first point of entry. For Fall/Winter 1993-94, total arriving passengers tallied 577,663.

Total Visitor Arrivals: This is the total number of visitors entering Alaska. Visitors were counted at the first point they entered the state. During Fall/Winter 1993-94, 190,486 visitors entered Alaska.

Entry/Intended Exit Modes and Mode Use Categories: Entry mode refers to the transportation mode used by visitors to enter Alaska. The AVSP sample was designed by entry mode ensuring accurate entry mode data. Exit data, requested of each visitor interviewed at the start of their trip through Alaska, reflected intention rather than actual behavior.

Sometimes visitors will enter by one transportation mode and exit by another. Therefore, entry mode figures alone do not show the total number of visitors using a particular mode. Figures for total mode use are reflected in the Mode Use sections of this document.

Sampled and Unsampled Visitors: Nearly all visitors (96% or 183,478) were represented by the sample for Fall/Winter 1993-94. Only a small percentage of entry locations were unsampled, due to their small number of arriving passengers and budget limitations. These included motorcoach arrivals on the Alaska and Klondike Highways, a small volume of Domestic Air first arrivals at locations other than the four sample points, and private vessel and aircraft arrivals at select locations (totaling 3.8%). While motorcoach arrivals were not sampled, each motorcoach was stopped at the Highway sample locations during each sample period. Drivers were asked the origin of the motorcoach, the number of passengers and whether the motorcoach was entering Alaska for the first time on this trip. This information was used to determine the size of the first arrival motorcoach market. Using past survey results and secondary research, visitor arrivals were estimated for other first arrivals (e.g. Domestic Air, private vessel and aircraft) at the unsampled locations.

Chapter I outlines all arrivals and visitor arrivals using both sampled and unsampled data. In Chapters II through IV, detailed findings are presented for **sampled visitor arrivals** only, unless otherwise noted. Chapter V presents full-year summary data for all arrivals.

Employment Categories: Three employment categories were available for visitors: employed, retired and other. The "other" category refers to people who are not participating in the labor force who are not retired, such as students, children and other individuals who are not employed.

Sampling Information

The sample days for each entry mode were selected using a random method based on passenger load information. Sample periods within each sample day were also selected using passenger load information. For instance, on each of the sample days selected for Domestic Airline sampling, six flights were selected to be sampled. Passenger load information was collected through a confidential reporting system two days prior to the sample day and flights were selected using a random process based on those passenger loads. In reviewing the data, the reader should be aware of the following special circumstances.

The *AVSP* sample was designed by entry mode ensuring accurate entry mode data. Exit data, requested of each of the visitors interviewed at the start of their trip through Alaska, reflects intention not actual behavior. Many visitors stayed for long periods of time and did not have set itineraries. Visitors most likely to not know their actual exit transportation mode were Independent visitors using the Highway or state Ferry system. Also, many visitors were not entirely familiar with Alaska geography believing they were leaving Alaska when they took a southbound ferry out of Haines, or believing they were flying out of Alaska when boarding a plane in Vancouver B.C. While interview techniques minimized these faulty responses, minor differences between intended exit mode and actual exit information are expected. Actual exit selection for the Fall/Winter 1993-94 will be available in the *Patterns, Opinions, and Planning* document, the sixth of the *AVSP III* reports.

Sample Design Limitations: Readers should understand the limitations of a sample, rather than a count or inventory, of visitors. While all visitors were "counted" by collecting secondary data by entry mode and carrier, their characteristics (such as origin, age, trip purpose, etc.) were measured only by the survey. From a sample of less than 1% of all visitors, the elaborate *AVSP* multi-stage cluster sample design was able to measure the characteristics of most groups of visitors with a high degree of accuracy ($\pm 2.6\%$). The *AVSP* sample is one of the largest and most sophisticated samples done in the U.S. visitor industry, but even it cannot do everything. When a specific group is so small that it is nearly undetectable in the sample this accuracy declines.

The multi-stage cluster sample design for *AVSP* ensures extremely accurate data for most visitor groups, including those of small to moderate significance (at least 2,000 out of 183,500 visitors). When readers look for visitor groups that are less than 0.5% of the total, existing survey methodology was not intended to record them accurately. For example, the total number of Overseas visitors (8,800) is considered accurate. However, the number of visitors from small volume countries, such as Belgium or Norway, were simply not measured as accurately as the numbers from major producing countries such as Germany and Japan.

This is also true for the nearly insignificant numbers produced by some states (e.g., North Dakota), which will not be recorded precisely by a methodology targeted at and budgeted for Alaska's major visitor groups. Only true random sampling, a financially unfeasible method, would accurately pinpoint the number of visitors from very small volume countries and states. Another more reasonable alternative to capture accurate visitor data from low volume countries would be to have a separate research effort concentrating only on Overseas visitors.

Charter Flights: Charter flights from both domestic and international origin points are reflected in the data. Domestic charter flights were a regular occurrence in Anchorage during the fall and winter months. These flights appeared during the days selected to be sampled and visitors were sampled from these flights. International charters, on the other hand, were scheduled irregularly and few in number. A special sample of international charter flights was conducted to ensure representation from this mode.

For a more detailed explanation of methodology, see the Appendix.

Summary of Major Findings

All Visitors

- The total of **all arrivals** (both residents and visitors) in Fall/Winter 1993-94 (October through April) was 577,663, an increase of 7% over Fall/Winter 1992-93.
- The total of all **visitor arrivals** in Fall/Winter 1993-94 was 190,486, one-third of total arrivals. Visitor arrivals in Fall/Winter 1993-94 increased approximately 3% since Fall/Winter 1989-90.
- Domestic Air brought nearly 88% of total arrivals, residents and non-residents, into Alaska, growing at an annual average rate of 6% between Fall/Winter 1989-90 and Fall/Winter 1993-94.
- One-half of the visitors to Alaska during Fall/Winter 1993-94 traveled for Business Only. Twenty-two percent (22%) traveled mainly to Visit Friends and Relatives and 15% traveled for Vacation/Pleasure.
- The total volume of Vacation/Pleasure visitors during the Fall/Winter season has increased at an annual average of 7%.
- The United States was the origin of the largest number of visitors (88%), followed by Canada (5%) and Overseas (5%). A small portion of the sample did not provide origin information.
- The average visitor during Fall/Winter 1993-94 intended to stay an average of 11.6 nights in the state and traveled in an average party size of 1.4 people.
- Overall, three in five visitors during Fall/Winter 1993-94 had traveled to Alaska at least once in the past five years for pleasure.
- More than 90% of Fall/Winter 1993-94 visitors planned to be independent travelers, with only 4% planning to purchase sightseeing tours instate.
- The average Alaska visitor during Fall/Winter 1993-94 was 38 years old, male (66%) rather than female (34%), and employed (78%).

Vacation/Pleasure Visitors (VPs)

- Vacation/Pleasure visitors were 15% of the total visitor market for Fall/Winter 1993-94, numbering 28,200.
- Domestic Air was the primary transportation mode to and from the state for Vacation/Pleasure visitors.
- Four of every five Vacation/Pleasure visitors traveled as Independents (84%), while only 6% planned to travel as Inde-Package visitors.
- Vacation/Pleasure visitors averaged 8.4 nights in the state, the shortest average stay of any trip purpose group.
- The average party size for Vacation/Pleasure visitors was 1.7, the largest average party size of any trip purpose group.
- More than one-half (54%) of Vacation/Pleasure visitors have taken repeat trips to Alaska for pleasure in the past five years.
- Three of every five Vacation/Pleasure visitors originated from the U. S., while another one of every five came from Canada. Sixteen percent (16%) of Fall/Winter 1993-94 Vacation/Pleasure visitors came from Overseas.
- The average Vacation/Pleasure visitor was as likely to be male as female, averaged 36 years of age, and was most likely employed.

Executive Summary

Resident and Visitor Arrivals

Total Arrivals

- All passengers (residents and visitors) arriving in Alaska during Fall/Winter (October through April) 1993-94 totaled 577,663. Visitor arrivals accounted for 33% of all arrivals, or 190,486 people.

Summary Table I

Total Arrivals to Alaska Fall/Winter 1993-94

Totals Arrivals	% Visitors	Total Visitors
577,663	33.0%	190,486

- Overall, total arrivals (residents and visitors) have increased significantly between Fall/Winter 1989-90 and 1993-94. Resident and visitor growth has remained steady, with an annual average of 4%. In Fall/Winter 1993-94, total arrivals surpassed the one-half million mark, totaling 556,426 passengers.

Summary Table II

Total Arrival Trends Passengers (Residents and Visitors Combined) Entering Alaska Sampled Modes Only Fall/Winter 1989-90 and 1993-94

	1989-90 ¹	1993-94	Total Change	Annual Average Change
Domestic Air	403,153	506,198	+25.6 %	+5.9 %
International Air	16,342	7,521	-54.0	-11.4
Highway-Personal Vehicles	35,183	30,104	-14.4	-3.4
Ferry	15,432	12,603	-18.3	-4.3
Total Sampled Modes	470,110	556,426	+18.4 %	+4.3 %

¹ Fall/Winter 1989-90 data was adjusted to the October to April season of Fall/Winter 1993-94 to ensure comparability.

Visitor Arrivals

- One-third, or 190,000 of total arrivals, were visitors, the majority arriving by Domestic Air. Business-related travel dominated the visitor market for F/W 1993-94, totaling 114,500 visitors. However, the total pleasure market (Vacation Pleasure and Visiting Friends and Relatives) was the fastest growing segment of the F/W market. During 1989-90, the total pleasure market was 34% of the total market. During F/W 1993-94, the total pleasure market was 38% of the total visitor market.

Summary Table III

Visitor Trends by Main Trip Purpose Fall/Winter 1989-90 and 1993-94 Sampled Modes Only

	1989-90¹	1993-94	Total Change	Annual Average Change
Vacation/Pleasure	21,800	28,200	+29.4 %	+6.6 %
Visiting Friends & Relatives	38,000	40,800	+7.4	+1.8
Business & Pleasure	28,400	19,000	-33.1	-7.4
Business Only	85,200	90,900	+6.7	+1.7
Seasonal Workers	5,000	4,600	-8.0	-1.9
Total Sampled Visitors	178,400	183,500	+2.9 %	+0.7 %

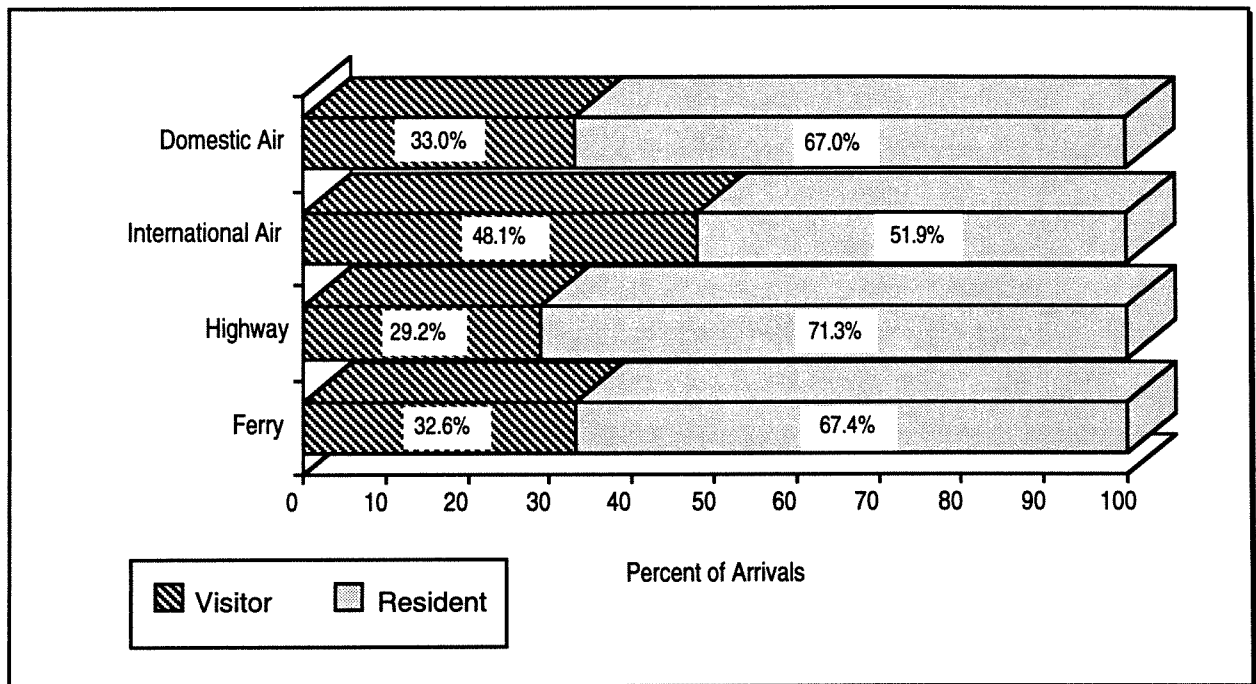
¹ Fall/Winter 1989-90 data was adjusted to the October to April season of Fall/Winter 1993-94 to ensure comparability.

Resident/Visitor Arrival Composition

- Two-thirds of all F/W 1993-94 arrivals in Alaska were residents. One-third, or 190,000, of total arrivals, were visitors.
- One-third of all Domestic Air arrivals were visitors.
- International Air arrivals were almost equally divided between residents and visitors.
- Highway and Ferry showed a relatively slight annual decrease in total arrivals into Alaska.

Summary Graph I

**Resident/Visitor Arrival Composition
By Entry Mode
Fall/Winter 1993-1994**



Visitor Arrivals by Entry Mode

- Domestic Air was the dominant arrival mode during F/W 1993-94, carrying 88% of all visitors to the state. The only transportation mode showing an increase in total arrivals, Domestic Air had an annual average increase in total arrivals (residents and visitors) of 6% between F/W 1989-90 and 1993-94.
- International Air experienced an 11% annual average decrease in total arrivals, bringing only 3,600 visitors to Alaska. With the changes in flight patterns for international air carriers, this was most likely a result of decreased landings for Anchorage International Airport.
- Highway mode was the second most utilized entry mode, carrying 4.5% of all visitors to Alaska. However, this was a slight decline since F/W 1989-90.
- The Alaska Marine Highway System (Ferry) represented a small portion of visitor arrivals, just 2% or 4,100 visitors. These numbers are a slight decline since F/W 1989-90.

Summary Table IV

Visitor Arrivals by Entry Mode Total Visitors Sampled and Unsampled by AVSP Survey Fall/Winter 1993-1994

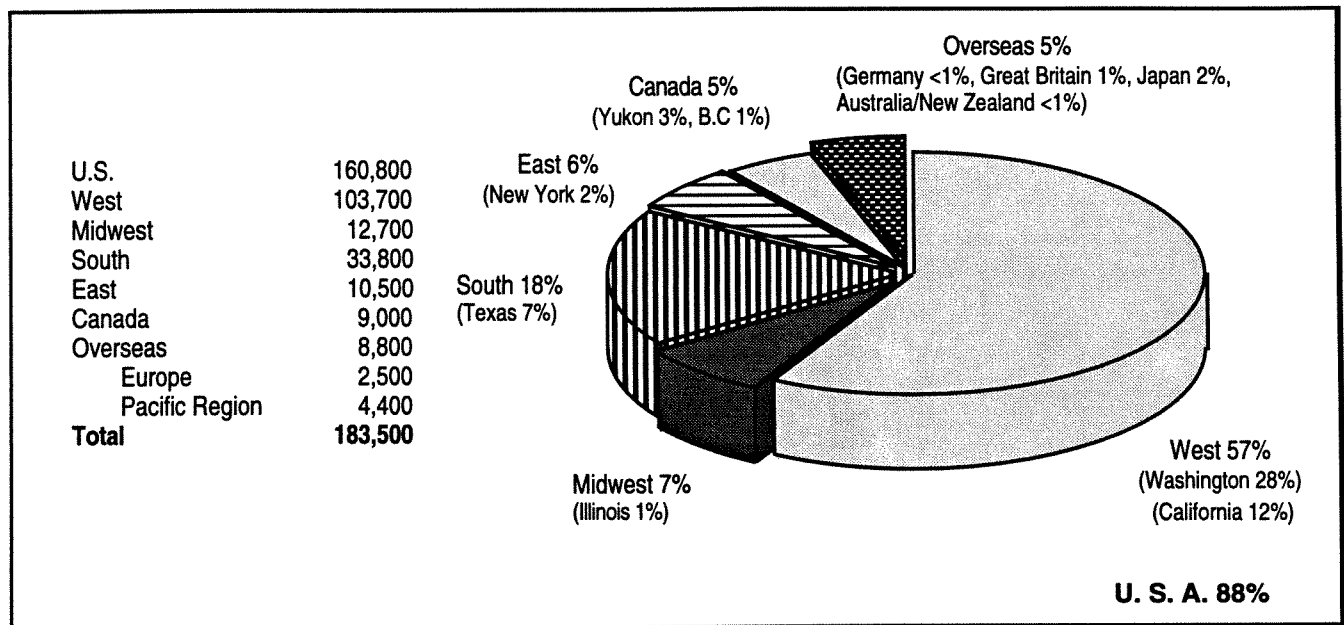
Sampled Arrivals	Total Arrivals	% Visitors	# of Visitors	% of Total Visitors
Domestic Air	506,198	33.0 %	167,126	87.7 %
Highway-Personal Vehicles	29,494	29.2	8,625	4.5
Ferry	12,603	32.6	4,109	2.2
International Air	7,521	48.1	3,618	1.9
Total Sampled Arrivals	555,816	33.0 %	183,478	96.3 %
Unsampled Arrivals				
Highway-Motorcoach	610	0.0	0.0	0.0
Other	21,237	33.0	7,008	3.7
Total All Arrivals	577,663	33.0 %	190,486	100.0 %

Visitor Arrivals by Origin

- The majority of Alaska F/W 1993-94 visitors (88%) came from the United States.
- Overall, the West brought the largest number of visitors from the U.S., accounting for 57% of the total visitor market.
- The southern states brought the second largest group of U.S. travelers to Alaska (18%).
- Overseas visitors equaled Canadian visitors, each accounting for 5% of the total visitor market.
- For Vacation/Pleasure visitors (VPs), the West accounted for the largest share of the U.S. market (40% of the total VP market). The second largest portion of the VP market came from Canada (20%), followed by Overseas (16%). Japanese visitors, the majority coming on Package trips to Southcentral and the Interior, accounted for 9% of all VPs during F/W 1993-94.

Summary Graph II

Visitor Origin - All Visitors
Fall/Winter 1993-1994



Full Year Summary (May 1993 through April 1994)

Resident and Visitor Arrivals

- For the twelve-month period of May 1993 through April 1994, a total of 1.8 million residents and visitors entered Alaska. Fifty-nine percent (59%) of these arrivals were non-resident visitors, totaling about 1.1 million people.
- Compared to the 1.3 million who arrived between June 1989 and May 1990, this represents an overall increase of 28% in total arrivals.

Summary Table V

Total Arrivals to Alaska Summer 1993 and Fall/Winter 1993-94

Totals Arrivals	% Visitors	Total Visitors Sampled and Unsampled Arrivals
1,785,801	58.9%	1,051,503

Visitor Arrivals by Trip Purpose

- The single most important reason for visitor travel to Alaska was Vacation/Pleasure, accounting for just over 60%, or 622,400, visitors.
- Those Visiting Friends and Relatives totaled 129,600 visitors in 1993-94, a decrease of 7% compared to the 131,200 visitors who arrived during (June to May) 1989-90.
- Between May 1993 and April 1994, 268,400 visitors traveled to Alaska for business-related reasons, 26% of the total visitor market. Business Only visitors accounted for 17% of the total visitor market.

Summary Table VI

Full Year Visitor Arrivals Summary By Trip Purpose (Sampled Arrivals Only) Summer 1993 and Fall/Winter 1993-1994

Trip Purpose	Summer Total	Fall/Winter Total	Year Total	Full Year % Change 89-90 to 93-94 ¹
Vacation/Pleasure	594,200	28,200	622,400	+73.4 %
Visiting Friends and Relatives	88,800	40,800	129,600	-6.9
Business and Pleasure	55,800	19,000	74,800	+1.9
Business Only	84,900	90,900	175,800	+27.1
Seasonal Worker	13,200	4,600	17,800	-52.5
Total Visitors	536,900	183,500	1,020,400	+36.2 %

¹ The full year sample for 1989-90 was June 1989 to May 1990. The full year sample for 1993-94 was May 1993 to April 1994.

Visitor Arrivals by Entry Mode

- Approximately 97% of all Summer 1993 and 96% of all Fall/Winter 1993-94 arrivals were included in the population sampled in the *Random Arrival Survey*.
- The 1.1 million non-resident visitors, which includes both sampled and unsampled visitor arrivals for May to April 1993-94, represent a 30.3% increase over the (June to May) 1989-90 total of 807,000 visitors.
- Domestic Air brought 58% of Alaska's visitors into the state, more than 600,000 visitors during 1993-94.
- Cruise Ship was the second most important arrival mode, accounting for nearly a quarter of a million visitors during 1993-94, compared to the 156,000 Cruise Ship arrivals during 1989-90.
- The third most popular arrival transportation mode for visitors was the Highway, with a total of 112,600 visitors arriving by personal vehicle during 1993-94.
- More than 33,000 visitors came to Alaska on the Alaska Marine Highway System (Ferry) during 1993--94.
- International Air accounted for only 1.6% of all visitors arrivals, with less than 17,000 visitors during 1993-94.

Summary Table VII

Full Year Visitor Arrivals Summary By Entry Mode (Sampled Arrivals Only) Summer 1993 and Fall/Winter 1993-1994

Entry Mode	Summer Total	Fall/Winter Total	Year Total	Full Year % Change 89-90 to 93-94¹
Domestic Air	443,600	167,100	610,700	+43.9 %
International Air	13,300	3,600	16,900	+77.0
Cruise Ship	247,000	—	247,000	+76.7
Highway	104,000	8,600	112,600	+12.9
Ferry	29,100	4,100	33,200	+14.1
Total Arriving Visitors	836,900	183,500	1,020,400	+48.0 %

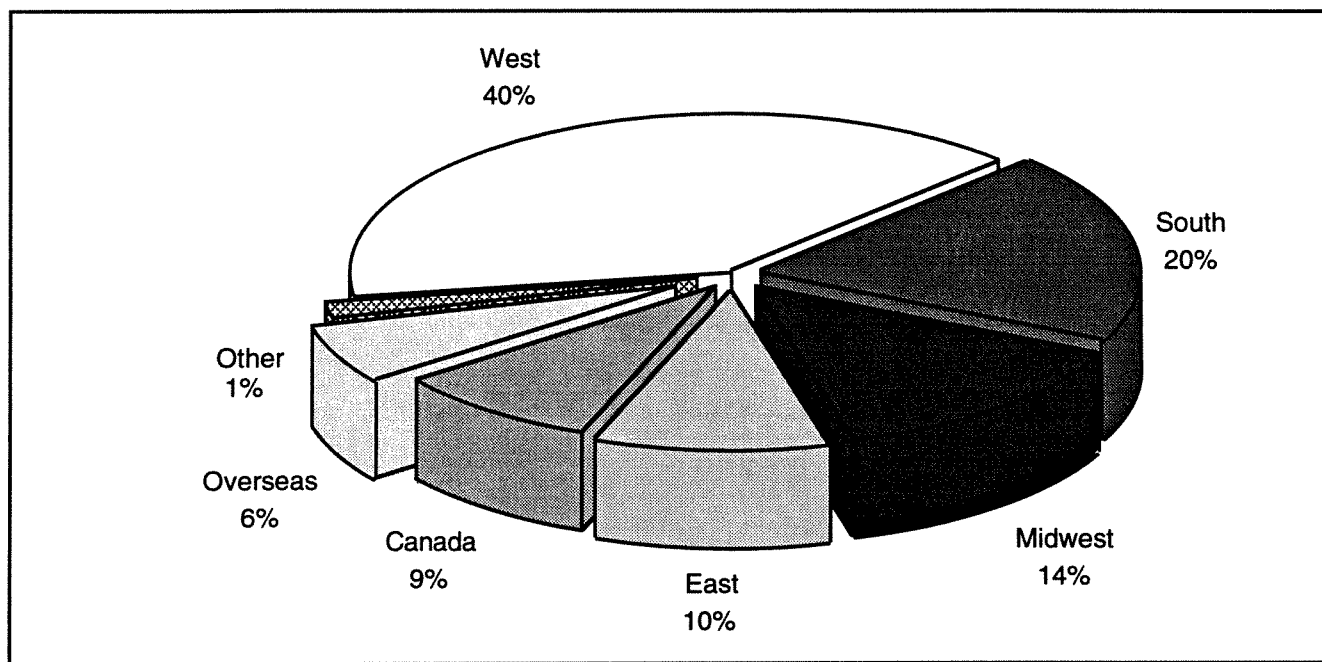
¹ The full year sample for 1989-90 was June 1989 to May 1990. The full year sample for 1993-94 was May 1993 to April 1994.

Visitor Arrivals by Origin

- Eight out of ten visitors to Alaska came from the U.S. during (May-April) 1993-94, approximately the same percentage as during (June-May) 1989-90.
- Two of every five visitors to Alaska came from the West, a smaller portion of the market compared to the 47% who came from the West during 1989-90.
- The South, Midwest and East increased their proportions of the total visitor market to Alaska between 1989-90 and 1993-94.
- The international market remained quite consistent in the proportion of the visitor market between 1989-90 and 1993-94.

Summary Graph III

**Visitor Arrivals by Origin
(Sampled Arrivals Only)
Summer 1993 and Fall/Winter 1993-1994**



Marketing Trends and Implications

Since 1985, the *Alaska Visitor Statistics Program (AVSP)* has collected data on the Alaska visitor market, providing current, up-to-date information to tourism marketers. The *Random Arrival Survey* is the first of three surveys conducted as part of the AVSP and collects basic information about visitors to Alaska. This document, the fourth of six major reports, presents the results of the *AVSP III Fall/Winter 1993-94 Random Arrival Survey*, as well as analysis for the full year of Summer 1993 and Fall/Winter 1993-94.

In previous AVSP studies, the month of May was included in a Fall/Winter/Spring analysis. Over the years, the growth in visitor volume in May has been so substantial that it is now considered a part of the summer season. Therefore, this third generation of the AVSP redefines the seasons as follows:

Summer Season:	May 1993 through September 1993
Fall/Winter Season:	October 1993 through April 1994

This change in seasonal definition offers a truer picture of the travel seasons in Alaska and the visitor markets found during those seasons. When comparisons are made in this document to *AVSP II 1989-90*, the previous data has been adjusted to reflect the new seasonal definitions.

The following discussion outlines key issues and trends found in the data and implications for tourism marketers.

1) Domestic Air is the most important transportation mode for all Fall/Winter visitor groups.

Domestic Air carried 167,100 visitors into Alaska in 1993-94, an increase of 13.8% since 1989-90. Further, this mode has become even more dominant, capturing 90% of all visitors during Fall/Winter 1993-94 compared with 85% four years earlier. All other arrival modes into Alaska carried fewer visitors than during 1989-90.

The dominance of the Domestic Air mode reflects not only visitor preference for this mode during the Fall/Winter season, but also the limitations of the other modes of transportation. Ferry schedules are reduced from the summer to allow for vessel maintenance; international flight arrivals are severely reduced; cruise ships do not travel to the state; and, visitors tend not to travel the highways during winter because of the weather. These other modes are attractive to summer visitors and therefore play a larger role during the summer months.

Marketers of Fall/Winter season products and services, whether to business or pleasure travelers, will find opportunities to reach their potential market through Domestic Air-related outlets. For example, all airlines have in-flight magazines, frequent flier programs, and special lounges for passengers who are members. Successful Fall/Winter season marketers have tapped into Domestic Air-related marketing venues, partnering with airlines to offer mileage, developing tour programs, or conducting special promotions. Such opportunities are readily available - only a little creativity is needed.

2) The Vacation/Pleasure visitor market segment during the fall and winter months is small but growing.

Dropping May as part of the Fall/Winter/Spring season reveals the true Vacation/Pleasure (VP) visitor market during October through April. This market, though only 15% of total visitors, has increased in proportion and grown substantially in volume since Fall/Winter 1989-90. With an average annual growth rate of nearly 7%, it is the fastest growing trip purpose group during these months.

Characteristics of Fall/Winter VPs differ from Summer VPs in a number of ways:

- They are younger by thirteen years, on average, than summer visitors, implying that marketing programs, products and services will require approaches that match the market's habits and values.
- On the other hand, a significant segment is older and includes participants of the popular Elderhostel programs. This group travels by ferry and air throughout the state and participates in shopping and tours while in communities. Learning more about Elderhostel programs and itineraries will provide marketers of tourism products and services another opportunity to tap into the growing Fall/Winter VP market.
- Overseas visitors comprise 16% of the Fall/Winter VP market, double the proportion of the Summer. Japanese visitors are primarily responsible for this higher proportion of Overseas visitors. This highly valued market represents an important group that has a continued interest in Alaska during these months, primarily for northern lights viewing.

These few examples clearly reflect the niche nature of the Fall/Winter VP market. Communities and businesses wanting to attract Fall/Winter business will need to develop products for these and other segments of the VP markets.

3) Characteristics of the Fall visitor market differ somewhat from the Winter visitor market.

Fall attracts fewer visitors to Alaska than Winter, but a higher proportion of Vacation/Pleasure and Visiting Friends and Relatives visitors. Winter, on the other hand, attracts more visitors than Fall and a much higher proportion of Business Only visitors. Some further differences exist in length of stay, travel type, repeat rates, origin and employment status between the seasons.

These differences suggest that the niche marketing concept applies to all trip purpose visitor groups and both seasons. For example, during Fall, the most popular holidays of the year, Thanksgiving and Christmas, drive VFR travel. Offering holiday products/services and promotions for residents and their VFR guests may help boost sales during a traditionally slow sales period for travel-related products. Winter products, such as skiing, dog sledding, northern lights viewing, etc., will need to be tailored for and marketed to the various groups. For example, Business and Pleasure visitors may want to take in a day of skiing while in the state. Convenient packaging which includes transportation, equipment, lift tickets (if needed), and even clothing for the day may be attractive to this market.

Taking the mystery out of how to put activities and sightseeing together is important to attract any potential niche markets found during the Fall/Winter months. Because these markets are primarily independent, the key will be for marketers to be flexible with their product offerings, providing both package and independent opportunities.



Chapter I: Arrivals

Total Arrivals

Visitor Arrivals

Resident/Visitor Arrival Composition

Total Arrivals by Entry Mode

Visitor Arrivals by Entry Mode

Visitor Arrivals by Main Trip Purpose

Total Arrivals

Total arrivals into the State of Alaska include all passengers, both residents and nonresidents, arriving by all forms of transportation. Arrival data is collected directly from domestic airlines serving Alaska (through a confidential reporting system), the Anchorage International Airport Manager's office, the Alaska Marine Highway Traffic Manager's Office, U.S. Customs Service offices in Anchorage, Tok (Alaska Highway), Poker Creek (Taylor Highway), Skagway (Klondike Highway), Juneau and Ketchikan, and from Cruise Line Agencies of Alaska.

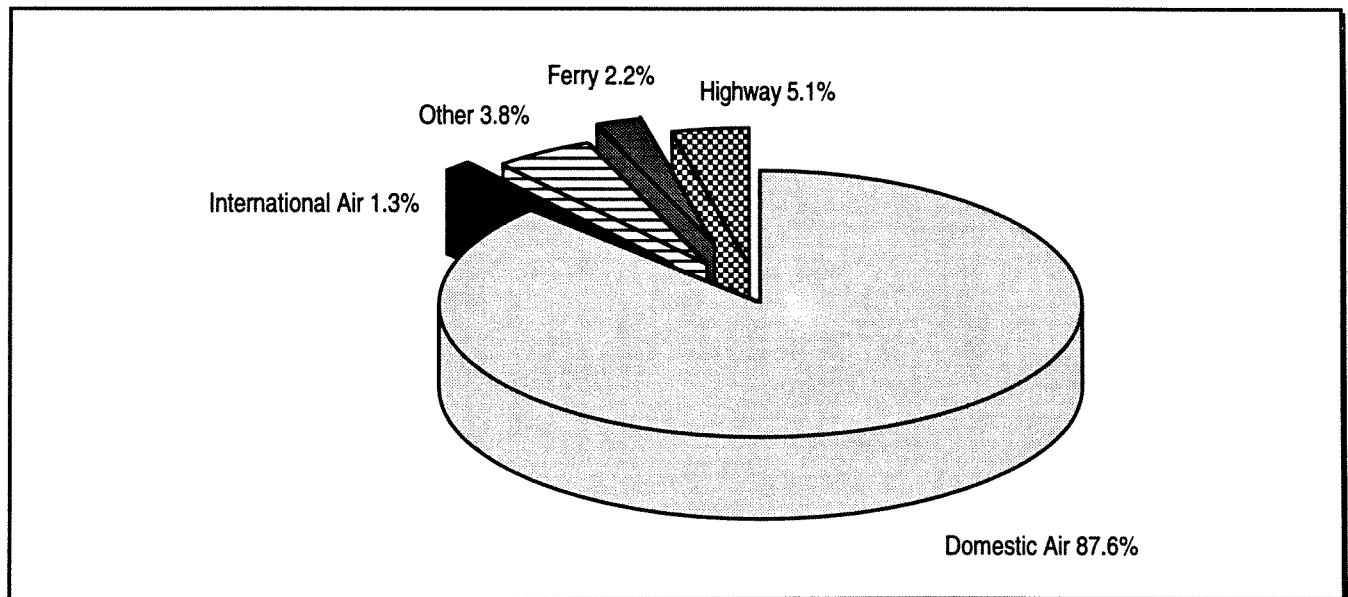
The Fall/Winter/Spring Season for 1985 through 1992 was defined as October through May. For the 1993-94 *AVSP*, May was added to the definition of the Summer Season. Therefore, for *AVSP III*, the Fall/Winter Season has been defined as October 1993 through April 1994. In order to compare 1993-94 results, 1989-90 data was adjusted to reflect October through April.

Graph I-1 presents arrival distributions by entry mode for visitors during Fall/Winter (October 1993 through April 1994). Table I-1 presents total arrival numbers by season and transportation mode. Fall is defined as October, November, and December 1993. Winter is defined as January, February, March and April 1994.

During Fall/Winter 1993-94, nearly 88% of the 577,663 total arrivals (residents and non-residents) into Alaska entered by domestic airlines. Since 1989-90, total arrival volume for International Air has decreased to only a 1.3% share.

Graph I-1

**Total Arrivals
By Entry Mode
Fall/Winter 1993-1994**



Domestic Air arrivals increased by more than 50,000 passengers between F/W 1992-93 and F/W 1993-94, an 11% increase. Of the 506,000 Domestic Air arrivals, 77% were Anchorage arrivals. Most F/W visitor arrivals were business people and this growth in Domestic Air arrivals may reflect Alaska's economic and business environment.

The total number of arriving passengers increased by about 42,000 passengers. However, total arrivals by all other transportation modes decreased during F/W 1993-94, compared to F/W 1992-93. Outside of the "Other" category, International Air arrivals and Highway arrivals had the most noticeable declines.

Table I-1

Total Arrivals
Total Passengers Entering Alaska
 (Residents and Visitors Combined)
 Fall/Winter 1993-1994

Mode	Fall	Winter	Total	% Change F/W 1992-93/1993-94
Domestic Air¹	215,467	290,731	506,198	+10.8 %
Anchorage	166,884	226,096	392,980	+10.2
Other	48,583	64,635	113,218	+13.2
International Air²	2,939	4,582	7,521	-10.1 %
Scheduled	2,705	4,506	7,211	-13.8
Charter	234	76	310	-
Highway³	11,853	18,251	30,104	-7.3 %
Alcan & Poker Creek				
Personal Vehicle	7,132	10,417	17,549	-9.6
Motorcoach ⁴	60	214	274	-32.5
Skagway				
Personal Vehicle	4,484	7,461	11,945	-1.8
Motorcoach ⁴	177	159	336	-29.9
Alaska Marine Highway⁵	5,029	7,574	12,603	-1.4 %
Departing Bellingham	3,167	4,447	7,614	-4.1
Departing Prince Rupert	1,862	3,127	4,989	+3.0
Other⁶	8,626	12,611	21,237	-25.9 %
Total Arriving Passengers⁷	243,914	333,749	577,663	+7.2 %
% of Change By Season 1992-1993	+7.9 %	+7.0 %	+7.3 %	

Footnotes appear on the following page

Table I-2 shows total arrivals, residents and visitors combined, for F/W 1993-94 by month. Total arrivals peaked in March, a month marked by spring vacations and school recesses. February had the lowest total entry count, with only 11% of all F/W passengers.

Domestic Air was used the most by residents and visitors during March, followed by the heavy holiday traffic of December and January. More than one-third of total arrivals for the Fall season arrived in December. March total arrivals on Domestic Air accounted for 28% of total Winter arrivals.

October was the best month of the Fall season for International Air, with 43% of total arrivals for the season. The heavy traffic for International Air during Winter was primarily Overseas visitors (especially Japanese visitors) traveling for pleasure.

The Alaska Marine Highway System (Ferry) and the Highways were most heavily utilized during the months just after and preceding the Summer season.

Table I-2

**Total Arrivals
Total Passengers Entering Alaska
(Residents and Visitors Combined)
October 1993 to April 1994**

Mode	October	November	December	January	February	March	April	Total
Domestic Air¹	67,719	69,696	78,052	76,360	60,515	82,711	71,145	506,198
Anchorage	52,856	53,886	60,142	59,995	47,555	64,498	54,048	392,980
Other	14,863	15,810	17,910	16,365	12,960	18,213	17,097	113,218
International Air²	1,283	746	910	804	1,173	1,475	1,130	7,521
Scheduled	1,054	746	905	803	1,100	1,473	1,130	7,211
Charter	229	0	5	1	73	2	0	310
Highway³	6,044	3,274	2,535	2,412	2,701	4,870	8,268	30,104
Alcan & Poker Creek								
Personal Vehicle	3,175	2,325	1,632	1,771	1,741	2,611	4,294	17,549
Motorcoach ⁴	37	11	12	40	53	1	120	274
Skagway								
Personal Vehicle	2,701	913	870	587	835	2,252	3,787	11,945
Motorcoach ⁴	131	25	21	14	72	6	67	336
Alaska Marine Highway⁵	2,064	1,382	1,583	1,410	1,455	1,854	2,855	12,603
Departing Bellingham	1,275	880	1,012	830	941	1,038	1,638	7,614
Departing Prince Rupert	789	502	571	580	514	816	1,217	4,989
Other⁶	2,805	2,541	3,280	3,084	2,555	3,391	3,581	21,237
Total Arriving Passengers⁷	79,915	77,639	86,360	84,070	68,399	94,301	86,979	577,663

Footnotes appear on the following page

Footnotes For Table I-1 and Table I-2

Important note: Arrivals are defined as passengers entering Alaska at their first point of entry, not as the total number of users of each mode. Further, the number of first arrivals shown at each entry point are only those using that point for their first stop. In Anchorage, for example, 392,980 passengers entered the state on Domestic Air carriers which landed first at Anchorage. Several times that number transited in and/or out of Anchorage by air from instate locations.

¹ Domestic air data was reported voluntarily by all airlines offering scheduled flights into Alaska. Domestic Air totals include both scheduled and charter flights by domestic carriers.

² International air data was obtained from the Anchorage International Airport Manager's Office, and includes passengers disembarking and clearing U.S. Customs but excludes active flight crews. International Air totals include both scheduled and charter flights by international carriers.

³ Highway data was provided by U.S. Customs for the Alcan, Taylor and Klondike Highway arrivals. Highway Personal Vehicle totals include all passengers passing into Alaska through U.S. Customs stations on Alaska, Taylor and Klondike Highways. These totals include passengers arriving in Alaska at their first point of entry and those previously entering Alaska at other points, such as on the Ferry in Southeast Alaska before driving into mainland Alaska. Those passengers not arriving by Highway as their first point of entry are screened out by the AVSP survey process and are not double counted in the following visitor totals. Passengers entering Alaska on the Klondike Highway who first visited mainland Alaska are also screened out by the survey process.

⁴ Highway Motorcoach arrivals are first arrivals only and, unlike the Personal Vehicle arrivals, do not include Motorcoach passengers who first entered Alaska at another point of entry. Motorcoach first arrivals are those passengers traveling from their point of origin entering Alaska first via Highway at the Alcan, Taylor and Klondike highways' U.S. Customs stations.

⁵ Alaska Marine Highway arrivals are the number of passengers on board as the ferries pass northbound into Alaska waters from the two outside points of departure, Prince Rupert, B.C. and Bellingham, WA. The total does not, of course, include users of the system boarding within Alaska.

⁶ The "Other" category includes commercial truck arrivals, domestic air arrivals at secondary and tertiary destinations, and estimates of charter and private air and vessel arrivals. This includes Domestic Air first arrivals at locations other than Ketchikan, Juneau, Anchorage and Fairbanks; some private vessel and aircraft arrivals; commercial truck passengers through Alcan, Taylor and Klondike checkpoints and a statistical adjustment to prevent disclosure of individual carrier volume. This does not include Skagway truck driver volume or crew members of all other passenger transportation modes.

⁷ Totals include Skagway arrivals. Skagway arrivals via the Klondike Highway were surveyed for the first time in 1989, and again in 1993, these arrivals are included in the totals but comparisons of Skagway arrivals prior to 1989 are not possible.

Visitor Arrivals

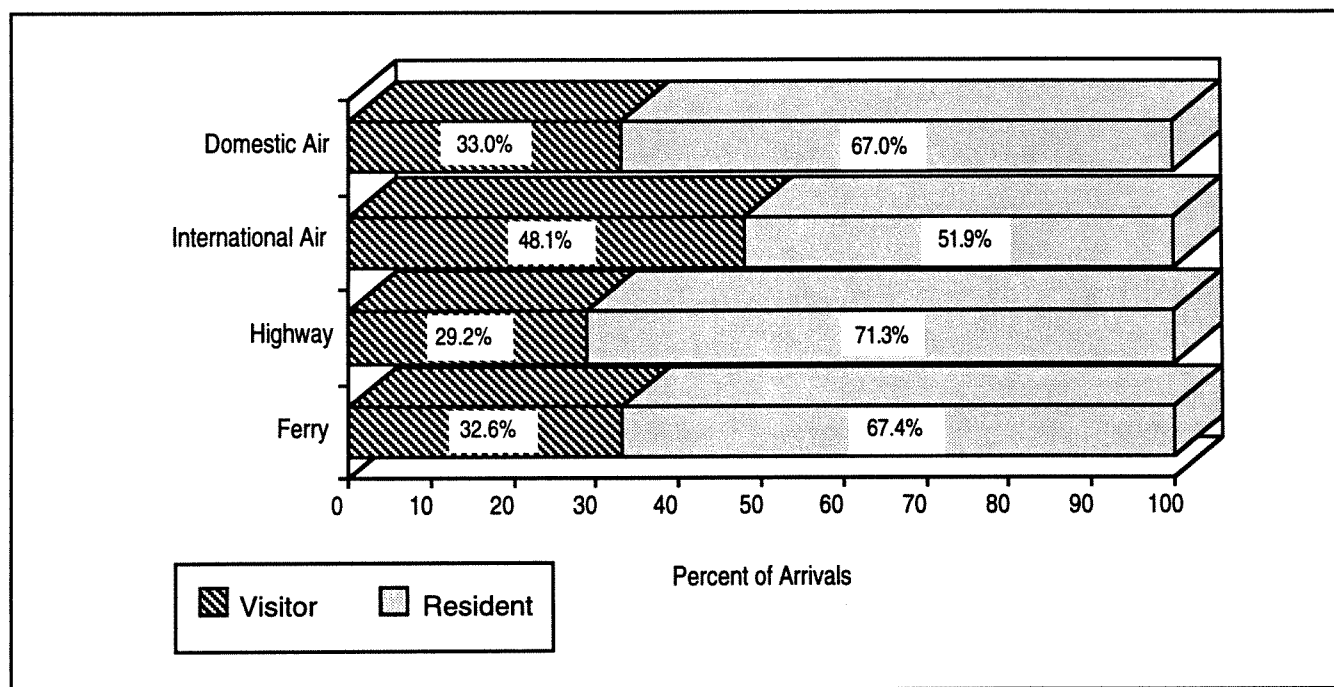
The *Random Arrival Survey (RAS)* process was used to determine the ratio of residents to non-residents entering Alaska by randomly sampling in each transportation mode. For example, all air passengers arriving in Juneau from Seattle on a sampled flight were asked, "Are you a resident or non-resident of Alaska?" as they deplaned. A tally was kept of residents and non-residents for each flight on each sample day at each location. This tally was used to calculate the resident/non-resident ratio. A similar process was used for each of the four main entry modes.

Resident/Visitor Arrival Composition

Two-thirds of all F/W 1993-94 arrivals in Alaska were residents. One-third, or 190,000 of total arrivals, were visitors, the majority arriving by Domestic Air. In comparison, 71% of the 1.2 million Summer 1993 arrivals were visitors, with nearly 444,000 arriving by Domestic Air.

Graph I-2

**Resident/Visitor Arrival Composition
By Entry Mode
Fall/Winter 1993-1994**



Total Visitor Arrivals by Entry Mode

Domestic Air was the most popular entry mode to Alaska, carrying 88% of all visitors to the state. Highway was the second most utilized entry mode, followed by Ferry and International Air. In comparison, during Summer 1993, Domestic Air brought in more than one-half of all visitors, followed by Cruise Ship, which accounted for 29% of the 1.2 million visitors.

Nearly all entry modes and entry locations into Alaska were sampled during F/W 1993-94. The 3.7% of those not sampled included a small volume of domestic airline arrivals to locations such as Wrangell, Petersburg, Sitka, Cordova and Yakutat, and private vessel and aircraft arrivals. Motorcoach entries at the Alaska, Taylor and Klondike Highways were also not sampled. Visitor arrivals for the unsampled locations were estimated using past survey results and secondary research. Table I-2 gives the breakdown of residents and visitors by entry mode for sampled and unsampled visitors.

Total Arrivals by Entry Mode

Table I-3 illustrates the changes in total arrivals to Alaska between F/W 1989-90 and F/W 1993-94. In order to compare the two seasons, the 1989-90 data was adjusted to match the October to April season of 1993-94.

Domestic Air was the only transportation mode showing an increase in total arrivals, with more than 100,000 additional passengers arriving into Alaska. This represented an annual increase in Domestic Air arrivals, both residents and non-residents, of 6%.

The most notable decline in total arrivals was in International Air, which experienced an 11% annual average change. With the changes in flight patterns for international air carriers, the result was decreased landings at Anchorage International Airport.

Highway and Ferry showed a relatively slight annual decrease in total arrivals into Alaska. However, when all four sampled modes were analyzed, 86,000 more residents and non-residents arrived in Alaska in F/W 1993-94, than in F/W 1989-90.

All study results following Table I-4 are for **sampled visitors only**, unless otherwise noted. By definition, the remainder of this report deals with the 96% of all visitor flows sampled in the survey process.

Table I-3

Visitor Arrivals by Entry Mode
Total Visitors Sampled and Unsampled by AVSP Survey
Fall/Winter 1993-1994

Sampled Arrivals	Total Arrivals	% Visitors	# of Visitors	% of Total Visitors
Domestic Air	506,198	33.0%	167,126	87.7%
Highway-Personal Vehicles	29,494	29.2	8,625	4.5
Ferry	12,603	32.6	4,109	2.2
International Air	7,521	48.1	3,618	1.9
Total Sampled Arrivals	555,816	33.0%	183,478	96.3%
Unsampled Arrivals				
Highway-Motorcoach	610	0.0	0.0	0.0
Other	21,237	33.0	7,008	3.7
Total All Arrivals	577,663	33.0%	190,486	100.0%

Table I-4

Total Arrival Trends by Entry Mode
Fall/Winter 1989-90 and 1993-94
Sampled Modes Only

	1989-90¹	1993-94	Total Change	Annual Average Change
Domestic Air	403,153	506,198	+25.6%	+5.9%
International Air	16,342	7,521	-54.0	-11.4
Highway-Personal Vehicles	35,183	30,104	-14.4	-3.4
Ferry	15,432	12,603	-18.3	-4.3
Total Sampled Modes	470,110	556,426	+18.4%	+4.3%

¹ Fall/Winter 1989-90 data was adjusted to the October to April season of Fall/Winter 1993-94 to ensure comparability.

Visitor Arrivals by Main Trip Purpose

Most F/W visitors (62%) to Alaska are business-related travelers. One-half of all visitors were here for Business Only. Visitors whose main purpose was pleasure-related, such as Vacation/Pleasure or Visiting Friends and Relatives, were 38% of all visitors arrivals.

Graph I-3

Visitor Arrivals by Main Trip Purpose
Percent of Sampled Visitors
Fall/Winter 1993-1994

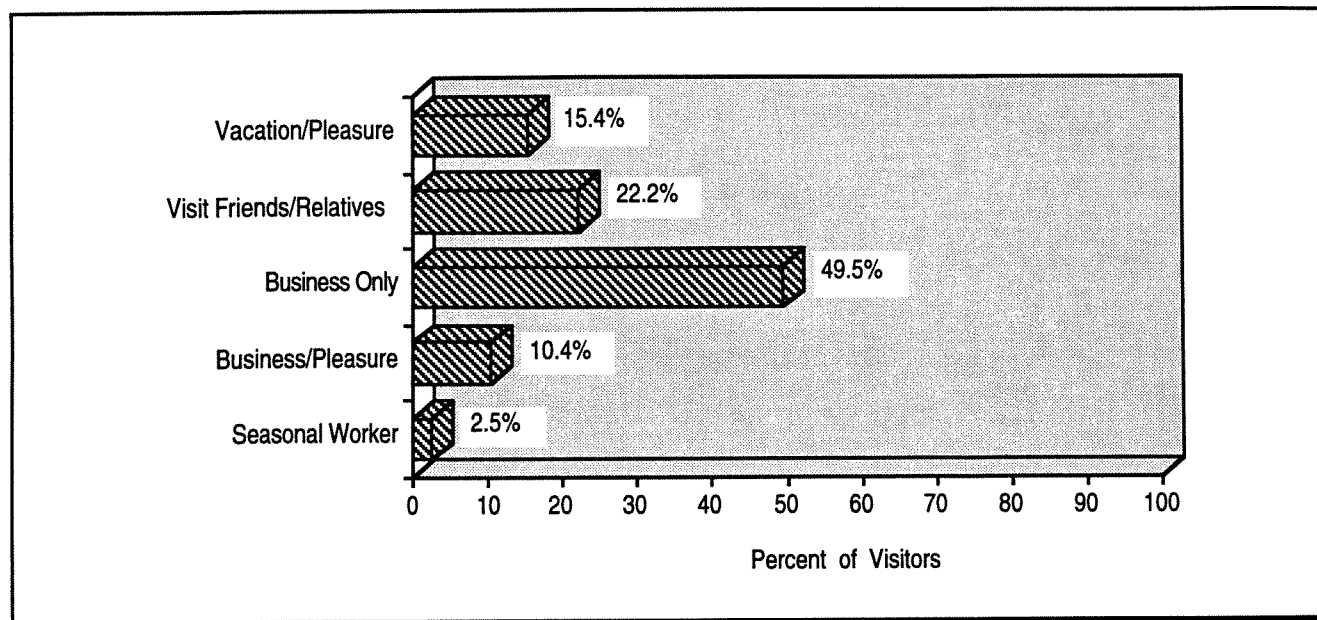


Table I-5

Visitor Arrivals by Main Trip Purpose
Fall/Winter 1993-1994

Trip Purpose	# of Visitors
Vacation/Pleasure	28,200
Visiting Friends & Relatives	40,800
Pleasure-related Total	69,000
Business & Pleasure	19,000
Business Only	90,900
Seasonal Workers	4,600
Business-related Total	114,500
Total	183,500

Chapter II: Visitor Overview

Trip Characteristics

Trip Purpose

Entry and Intended Exit Mode

Intended Travel Type

Intended Length of Stay

Party Size

Visitor Characteristics

Repeat Visits

Origin

Age

Gender

Employment Status

Trip Characteristics

Introduction

The second step of the *Random Arrival Survey* (RAS) process involved selecting a sample of visitors to survey. During the resident/non-resident tally, a statistically random sample of visitors were interviewed by professionally trained, uniformed interviewers. The interview lasted approximately five minutes. The remainder of this report presents the results of the *Random Arrival Survey*.

Since this chapter contains data pertaining to sampled visitors only, readers will find some entry mode totals to be slightly less than the totals presented in the Arrivals chapter (Chapter I). The Arrivals chapter contains the 96% of all sampled arrivals as well as the 4% who were not part of the total sample. For instance, in Chapter I, the visitor arrivals total was 190,486. Survey results indicated that the total visitor arrivals was 183,478. The purpose of this chapter and those remaining is to present survey results derived from the RAS.

RAS data was collected from visitors upon their arrival in Alaska and represents visitor intentions for exit mode, travel type, and length of stay. Many visitors were uncertain of their final decision for these items when first arriving in Alaska. Actual exit mode, travel type and length of stay results were collected utilizing the *Visitor Opinion Survey*, the third AVSP survey instrument. This information will be included in *Patterns, Opinions and Planning Fall/Winter 1993-94*, the sixth of the AVSP III series reports.

The RAS contained questions defining ten characteristics which were divided into two categories: trip characteristics and visitor characteristics.

Trip Characteristics

Trip Purpose

Entry/Intended Exit Transportation
Mode

Intended Travel Type

Length of Stay

Visitor Characteristics

Repeat Visit Rate

Origin

Party Size

Age

Gender

Employment Status

Trip and Visitor characteristic data was derived from 1,508 personal intercept surveys representing 183,500 visitors who arrived in Alaska during Fall/Winter (September to April) 1993-94.

Trip Purpose

Visitors were asked which of five trip purposes (Business Only, Business and Pleasure, Vacation/Pleasure, Visiting Friends and Relatives, or Seasonal Worker) was the main purpose for this Alaska trip. This question was followed by another asking for their secondary trip purpose, if any.

Business-related travel dominated the visitor market for F/W 1993-94 among trip purpose groups, totaling 114,500 visitors. Business Only accounted for 50% of all visitors to Alaska. The second largest visitor trip purpose group were those Visiting Friends and Relatives, 22% of the total visitor market. Vacation/Pleasure followed with 28,200 visitors, or 15% of the total F/W 1993-94 visitor market. Business/Pleasure visitors were 10% of the market and Seasonal Workers were about 3% of the market.

Those Visiting Friends and Relatives (VFR) had a positive change, increasing 7% between F/W 1989-90 and F/W 1993-94. This was in contrast to the Summer 1993 VFR market which experienced a slight decline in market shares.

When the pleasure-related visitor market was analyzed as a whole, combining Vacation/Pleasure visitors with those Visiting Friends and Relatives, the overall growth rate reached 15.4%. More than 9,000 travelers whose purpose was pleasure-related arrived during F/W 1993-94 than in F/W 1989-90. The total pleasure market (Vacation/Pleasure visitors plus those Visiting Friends and Relatives) share has grown continually over the past four years, from 34% of the F/W 1989-90 total visitor market to 38% of the F/W 1993-94 total visitor market. Total volume has increased at an annual average of 7%. This mirrored the growth pattern observed for Vacation/Pleasure visitors during the summers (from 66% in 1989 to 71% in 1993). Such a positive gain in the number of F/W pleasure visitors suggests that the notion of only visiting Alaska in the "good weather" is not as prevalent as some may assume.

While Business Only visitors showed an increase of nearly 6% between F/W 1989-90 and F/W 1993-94, the overall Business-related visitor market has decreased. During F/W 1989-90, the total Business-related visitor market numbered 118,600 arrivals. During F/W 1993-94, that total was 114,500, representing a decrease in Business-related visitors of -3.5%.

Visitors traveling on Business and Pleasure showed the most dramatic decrease, averaging -7% per year between F/W 1989-90 and F/W 1993-94. The Business and Pleasure market also had a slight decline in market shares during Summer 1993.

Graph II-1

Visitors by Trip Purpose Fall/Winter 1993-1994

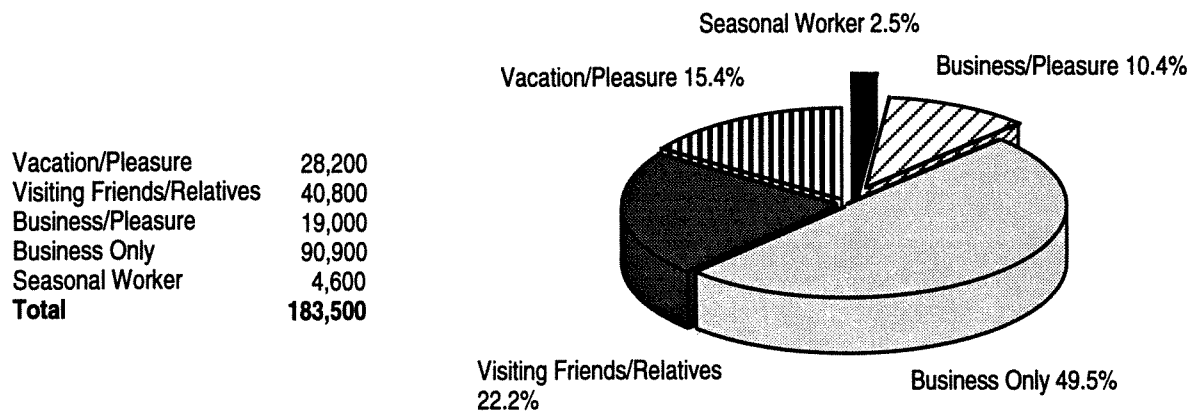


Table II-1

Visitor Trends by Main Trip Purpose Fall/Winter 1989-90 and 1993-94 Sampled Modes Only

	1989-90 ¹	1993-94	Total Change	Annual Average Change
Vacation/Pleasure	21,800	28,200	+29.4%	+6.6%
Visiting Friends & Relatives	38,000	40,800	+7.4	+1.8
Business & Pleasure	28,400	19,000	-33.1	-7.4
Business Only	85,200	90,900	+6.7	+1.7
Seasonal Worker	5,000	4,600	-8.0	-1.9
Total Sampled Visitors	178,400	183,500	+2.9%	+0.7%

¹ Fall/Winter 1989-90 data was adjusted to the October to April season of Fall/Winter 1993-94 to ensure comparability.

The Vacation/Pleasure Visitor Market

Vacation/Pleasure (VP) visitors are the major component of the Alaska visitor industry. Vacationers are most likely to be affected by marketing programs implemented by the State of Alaska Division of Tourism, the Alaska Tourism Marketing Council and by private sector tourism organizations and businesses.

Nearly three-quarters of all Summer 1993 visitors to Alaska cited Vacation/Pleasure as their main trip purpose. During F/W 1993-94, one out of every five visitors to Alaska came for Vacation/Pleasure. However, the vacation market carried even greater value when the total VP market, including primary and secondary markets, was considered. Many visitors came to Alaska for more than one reason. For instance, some VP visitors indicated that their primary purpose for travel during F/W 1993-94 was for vacation and that another reason for traveling to Alaska was to visit with friends.

The total VP market for F/W 1993-94 included those whose main trip purpose was to Visit Friends and Relatives (VFR) but said they planned to go sightseeing in other parts of the state (24% of VFRs) and also 56% of all Business and Pleasure (BP) visitors who stated they would add days for pleasure-related activities. Therefore the total VP visitor market for F/W 1993-94 generated 48,700 visitors.

For the twelve-month period of May 1993 to April 1994, Alaska received a total of 721,000 Vacation/Pleasure visitors, including the primary and secondary markets. Compared to the June 1989 to May 1990 period, this represents an increase of +40.2% in the Vacation/Pleasure market.

Table II-2

The Vacation/Pleasure Visitor Market Summer 1993 and Fall/Winter 1993-94

	Summer 1993	F/W 1993-94	Full Year
Primary Market			
Visitors with Vacation/Pleasure as Main Trip Purpose	594,200	28,200	622,400
Secondary Markets			
VFR Visitors with Vacation/Pleasure as Secondary Trip Purpose	40,800	9,900	50,700
B & P Visitors with Vacation/Pleasure as Secondary Trip Purpose	37,300	10,600	47,900
Total Vacation/Pleasure Visitor Market	672,300	48,700	721,000

The Visiting Friends and Relatives Visitor Market

The Visiting Friends and Relatives (VFR) market was the second largest market by trip purpose during F/W 1993-94 and the second most important market (22%) during Summer 1993, accounting for 11% of the total summer visitor market. Many of these visitors incorporated pleasure activities into their trip. Therefore, these visitors could be influenced by marketing programs implemented in the areas they visited.

Secondary market groups increased the clout of this VFR market. An additional 14,800 (53%) Vacation/Pleasure (VP) visitors indicated visiting friends and relatives was an additional reason for traveling to Alaska during F/W 1993-94. Among Business and Pleasure (BP) visitors, 44% stated their secondary trip purpose was to Visit Friends and Relatives. Therefore, the total VFR market for Fall/Winter 1993-94 was 64,000 visitors.

For the twelve-month period of May 1993 to April 1994, Alaska received a total of 284,700 VFR visitors, including the primary and secondary markets. Compared to June 1989 to May 1990, this represents an increase in the VFR market of +13.3%.

Table II-3

The Visiting (Alaska) Friends and Relatives Visitor Market Summer 1993 and Fall/Winter 1993-94

	Summer 1993	F/W 1993-94	Full Year
Primary Market			
Visitors with Visit Friends/Relatives as Main Trip Purpose	88,800	40,800	129,600
Secondary Markets			
VP Visitors with VFR'ing as Secondary Trip Purpose	114,300	14,800	129,100
B & P Visitors with VFR'ing as Secondary Trip Purpose	17,600	8,400	26,000
Total VFR Visitor Market	220,700	64,000	284,700

The Business Visitor Market

Although the business visitor market is probably not influenced by Alaska's marketing programs to the same degree as the pleasure visitor market, they contribute significantly to Alaska's travel industry, particularly during the Fall/Winter season. Business was the sole purpose for travel to Alaska for 50% of all Fall/Winter visitors. Another primary market was the Business and Pleasure (BP) visitors who did not add days to their trip for pleasure purposes, one-third of the total BP visitor market.

Secondary business-related visitor markets included Business and Pleasure visitors who added days to their trip for pleasure purposes, 66% of the total BP market. Seasonal Workers, considered business-related even though much of this segment does not purchase accommodations or other travel services in the same sense that other business visitors do, added an additional 4,600 visitors to the total business visitor market for F/W 1993-94.

The total business visitor market for Fall/Winter 1993-94 was 112,400 visitors. During the twelve-month period of May 1993 to April 1994, the total business visitor market for Alaska was 264,100, including primary and secondary markets. Compared to June 1989 to May 1990, there has been an increase of +10.3% in the total business visitor market.

Table II-4

The Business Visitor Market Summer 1993 and Fall/Winter 1993-94

	Summer 1993	F/W 1993-94	Full Year
Primary Market			
Visitors with Business Only as Their Main Trip Purpose	84,900	90,900	175,800
Business & Pleasure Visitors not adding days to their trip for pleasure purposes	16,300	6,300	22,600
Secondary Markets			
Business & Pleasure visitors adding days to their trip for pleasure purposes	37,300	10,600	47,900
Seasonal Workers	13,200	4,600	17,800
Total VFR Visitor Market	151,700	112,400	264,100

Entry and Intended Exit Transportation Modes

Domestic Air carried the largest number of visitors into Alaska, with 91% flying into the state during F/W 1993-94. Less than 5% of all visitors entered by personal vehicle via Highway. The Alaska Marine Highway System (Ferry) and International Air each transported approximately 2% of all visitors.

These proportions are similar to those of F/W 1989-90. However, entry modes differ between Summer and Fall/Winter. Cruise Ship arrivals constituted almost one-third of the total Summer 1993 entry mode market.

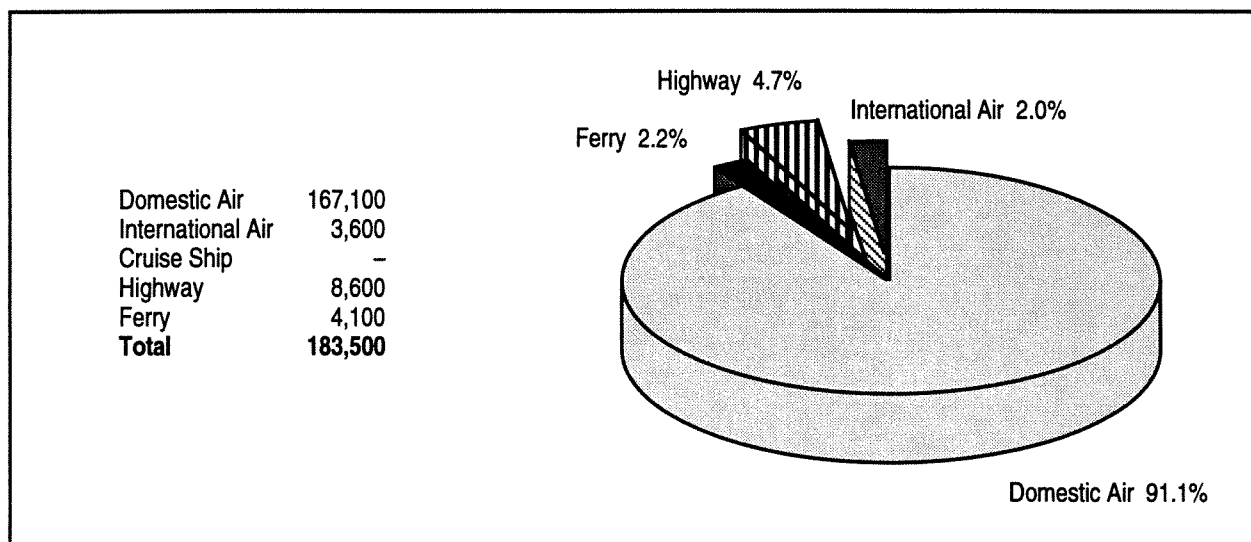
Intended exit mirrored entry mode proportions with only slight variations. Again Domestic Air dominated the market with 90% of the market intending to exit by this mode. The addition of Cruise Ship related most likely to those visitors arriving in April on the first leg of a cruise/tour package, with probable exit on the first cruise ships of the season in May 1994.

The AVSP sample was designed by entry mode ensuring accurate entry mode data. Exit data, requested of each visitor interviewed at the beginning of their trip through Alaska, reflected intention rather than actual behavior. Many visitors were uncertain as to their length of stay and did not have set itineraries. For example, business-related travelers were not always certain how long it would take to complete their tasks. Visitors most likely to not know their actual exit transportation mode were independent visitors, which included most business-related travelers.

While interview techniques minimized these faulty responses, minor differences between intended exit mode and actual exit information are expected. Actual exit selection will be available in *Patterns, Opinions and Planning, Fall/Winter 1993-94*, the sixth of the AVSP III reports.

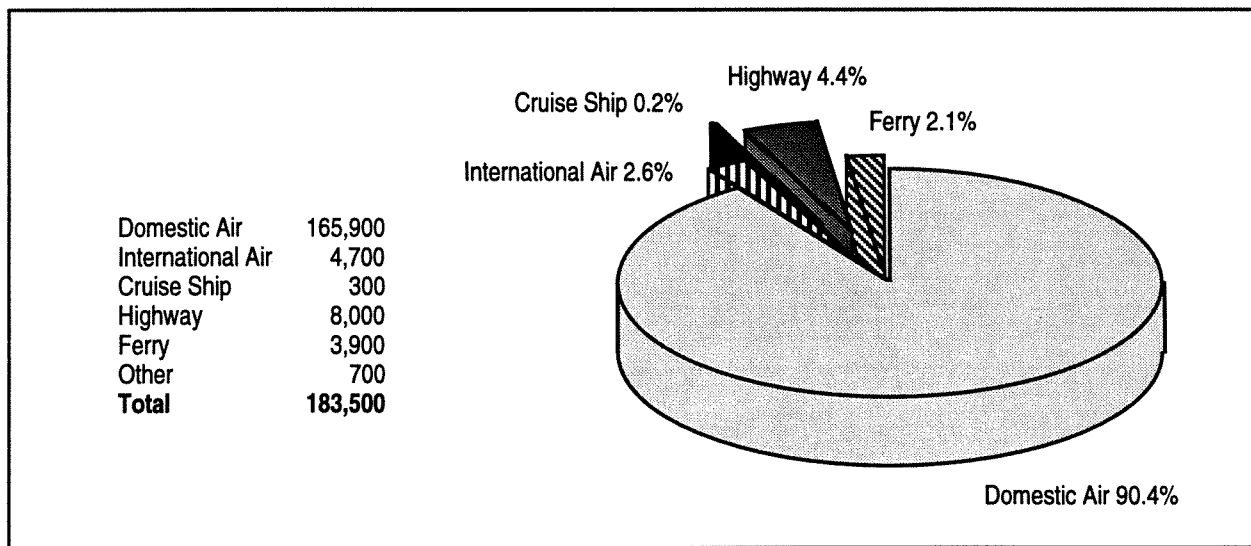
Graph II-2

Visitors by Entry Mode Fall/Winter 1993-1994



Graph II-3

Visitors by Intended Exit Mode Fall/Winter 1993-1994



Mode Use Patterns

Travelers to Alaska had several itinerary options that included using the same transportation mode to and from Alaska or using one mode to travel to Alaska and another to return home. Most visitors chose to travel round-trip utilizing the same mode in both directions. Nearly all visitors who entered by Domestic Air (98%) intended to exit by Domestic Air. The majority of Highway travelers (85%) and Ferry visitors (73%) also entered and intended to leave Alaska by the same transportation mode. Slightly fewer, yet still the majority, of International Air visitors (67%) planned to enter and exit by the same mode.

For visitors planning a different exit mode than entry mode, Domestic Air was the most often cited. Another common travel itinerary involved entering either by Highway or Ferry and exiting using the other transportation mode (since vehicles can be accommodated by both modes).

Compared to Summer 1993 visitors, F/W visitors were more likely to enter and exit Alaska by the same transportation mode.

Table II-5

Mode Use Patterns of All Visitors Fall/Winter 1993-1994

	← Entry Mode →					Total
	Domestic Air	Cruise Ship	Highway	Ferry	Int'l Air	
Intended Exit Mode						
Domestic Air	98%*	— %	7 %	12 %	33 %	90 %
Cruise Ship	<1	—*	—	—	—	<1
Highway - Personal Vehicles	<1	—	85*	15	—	4
Ferry	<1	—	7	73*	—	3
International Air	1	—	1	—	67*	3
Other	—	—	—	—	—	—*
Total	100 %	— %	100 %	100 %	100 %	100 %

* Percent using same mode for both entry and exit.

Market Size by Transportation Mode Use

The total market size for a mode combines round-trip visitors using the same mode for both legs of their journey and visitors who used the mode for one leg of the journey. As in previous years, Domestic Air dominated all other modes, with 92% of the total market. During F/W 1993-94, 5,600 visitors used Domestic Air to either enter the state or exit the state, while 163,700 used Domestic Air round-trip. Therefore, the total market size is 169,300.

Most Highway and Ferry users traveled round-trip. Only International Air had the distinction of having more one-way users than round-trip users. This is partly a result of flight patterns for international air carriers and some winter vacation packages which include a domestic air leg.

Table II-6

Mode Market Size¹ For All Visitors - Fall/Winter 1993-1994

	One-Way Users	Round-Trip Users	Total Users	Total Users as % of Visitor Market
Domestic Air	5,600	163,700	169,300	92%
Highway-Personal Vehicles	2,000	7,300	9,300	5
Ferry	2,000	3,000	5,000	3
International Air	3,500	2,400	5,900	3
Other/Don't Know	1,000	—	—	—
Total Visitors	6,550²	176,400	189,500	100%

¹ Total number of visitors using each mode for entry and exit. For example: 5,600 visitors used Domestic Air one way for either exit or entry. In addition 163,700 visitors used Domestic Air for both entry and exit. Therefore, the total number of users of Domestic Air is 169,300.

² The total number of visitors in this column is half the sum of the one-way users, because each visitor is counted twice in this analysis (once for the entry mode used, and once for the exit mode).

Trip Purpose Analysis by Entry Mode

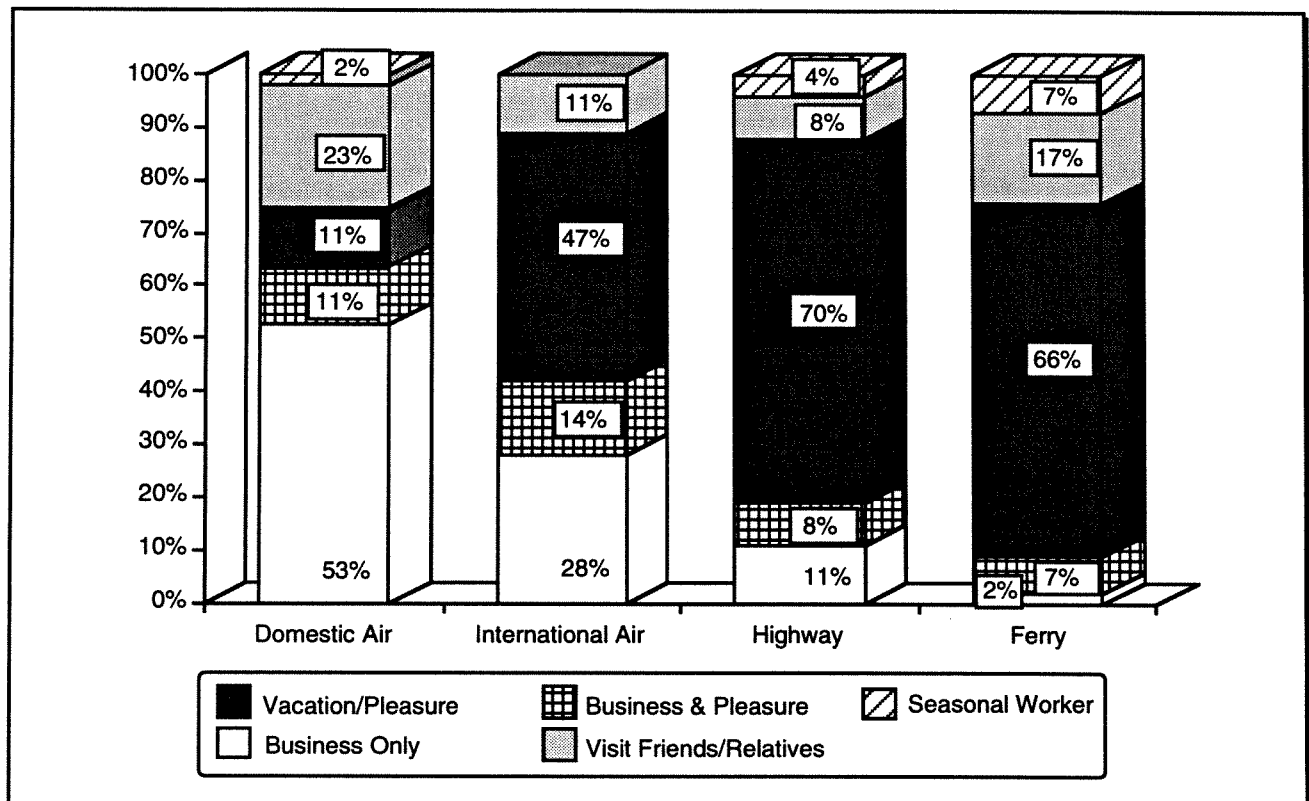
Each entry mode catered to a variety of trip purpose groups. Domestic Air was predominantly used by Business Only visitors, followed by those Visiting Friends and Relatives. Business and Pleasure visitors and those visiting for Vacation/Pleasure used Domestic Air equally. International Air was heavily used by Vacation/Pleasure visitors and Business Only travelers. The Alaska Marine Highway System (Ferry) was dominated by the pleasure market, with 83% of users traveling for Vacation/Pleasure and Visiting Friends and Relatives. Several Elderhostel tours were a significant part of this pleasure market.

The majority of Highway users were visiting for Vacation/Pleasure, followed by those on Business Only. Those Visiting Friends and Relatives and those on Business and Pleasure used the Highway entry mode equally.

The Alaska Marine Highway System (Ferry) was dominated by the pleasure market, with 83% of users traveling for Vacation/Pleasure and Visiting Friends and Relatives. Several Elderhostel tours were a significant part of this pleasure market.

Graph II-4

Trip Purpose of Entry Mode Visitors
Percent of Sampled Visitors
Fall/Winter 1993-1994



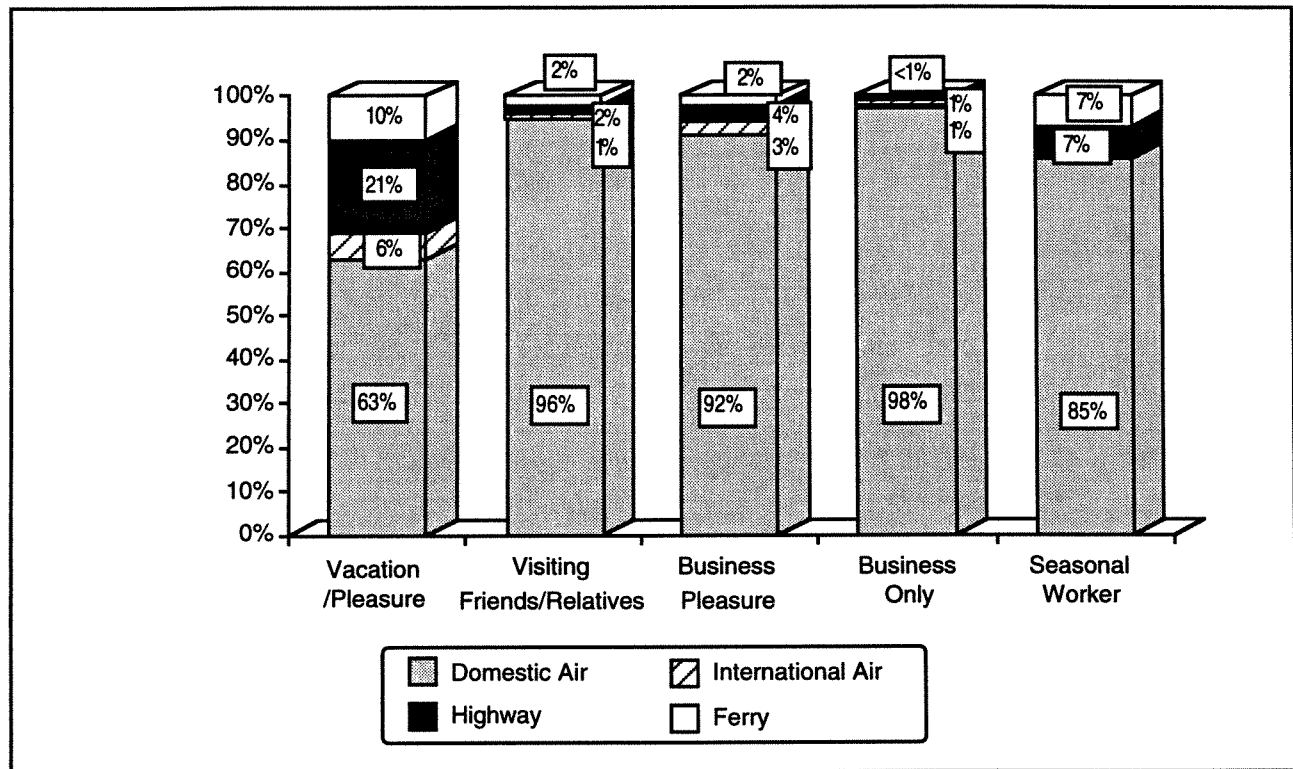
Entry Mode Analysis by Trip Purpose

When entry modes were analyzed by trip purpose, Domestic Air's dominance in all trip purpose groups was apparent. For each trip purpose category, the majority of visitors utilized Domestic Air. The most variance in entry mode was among Vacation/Pleasure visitors, who entered Alaska on every form of transportation mode.

Business Only visitors were the least likely to use a variety of transportation modes, traveling almost exclusively by Domestic Air.

Graph II-5

Entry Modes of Trip Purpose Visitors
Percent of Sampled Visitors
Fall/Winter 1993-1994



Entry Mode Arrival Trends, Fall/Winter/Spring 1989-90 and 1993-94

Overall, all sampled entry modes have experienced slight market growth, with 5,000 more visitors coming into Alaska during F/W 1993-94, compared to F/W 1989-90.

However, when examined by transportation mode, Domestic Air was the primary growth mode, while the other three entry modes experienced decline. Entry by Domestic Air has grown at an annual average rate of 3.3%. Charter traffic, new carriers, competitive fares, scheduling and winter packaging changes have all contributed to Domestic Air's rising numbers.

Although International Air experienced sizable increases between 1985-86 and 1989-90, it has declined at an average annual rate of 15% since that time. Changes in international flight patterns contributed to lower arrival numbers. Since air space has opened over Russia, fewer passenger planes require a fueling stop as a part of their flight plan. Also, innovations in plane engines have created greater fuel efficiency on the larger sized jets used for most international flight, resulting in fewer stops to refuel.

Although Highway experienced a 5% annual average decline during F/W 1993-94, it also experienced considerable growth during Summer 1993. Between Summer 1989 and Summer 1993, Highway grew at an annual average rate of nearly 9%.

The Alaska Marine Highway System (Ferry) also experienced a decrease in annual average change between F/W 1989-90 and F/W 1993-94 of about 8%. However, this entry mode grew a total of 29% between AVSP I in Summer 1985 and AVSP III in Summer 1993. In fact, the potential addition of a new vessel to the fleet could increase the Ferry system's ability to accommodate larger visitor numbers.

Table II-7

Visitor Trends by Entry Mode Fall/Winter, 1989-90 and 1993-94

	1989-90¹	1993-94	Total Change	Annual Average Change
Domestic Air	146,900	167,100	+13.8%	+3.3%
International Air	14,300	3,600	-74.8	-15.0
Highway-Personal Vehicles	10,900	8,600	-21.1	-4.9
Ferry	6,300	4,100	-36.9	-8.2
Total Sampled Modes	178,400	183,500	+2.9%	+0.7%

¹ Fall/Winter 1989-90 data was adjusted to the October to April season of Fall/Winter 1993-94 to ensure comparability.

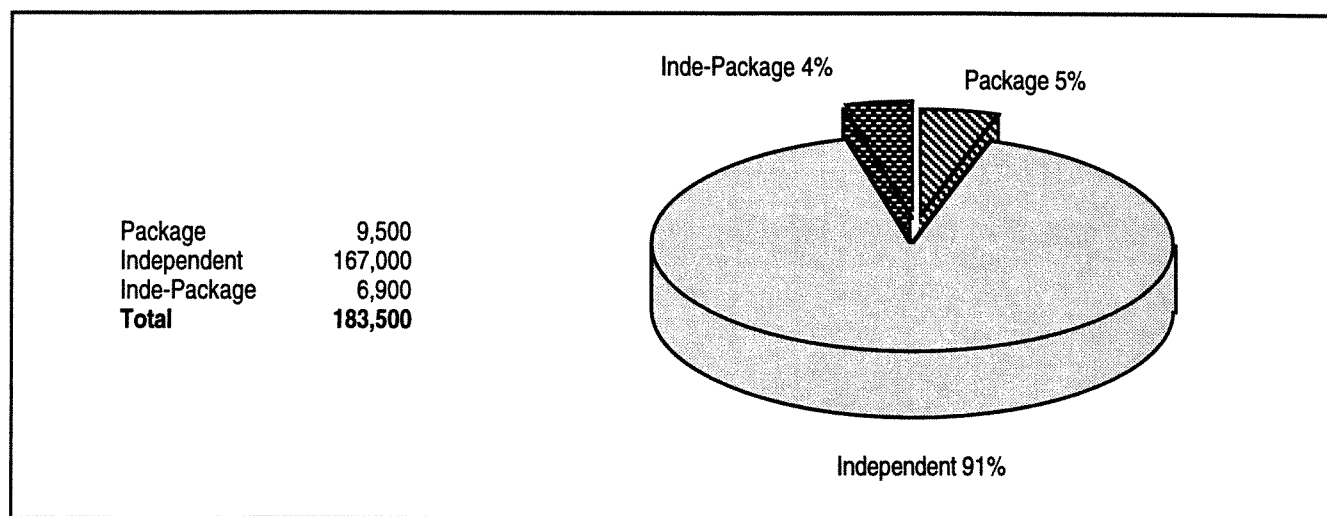
Intended Travel Type

Independent travelers were the largest travel type group among all visitors to Alaska during F/W 1993-94. The total Independent market (95%) included visitors who were completely on their own (91%) and visitors who intended to purchase sightseeing trips while in Alaska, known as Inde-Package visitors (4%). Package visitors were 5% of all visitors.

VP travel type proportions differed slightly from all visitor proportions. While the Independent market is still the overwhelming majority of all VPs (90%), the Package market increased to 10% of the total VP market.

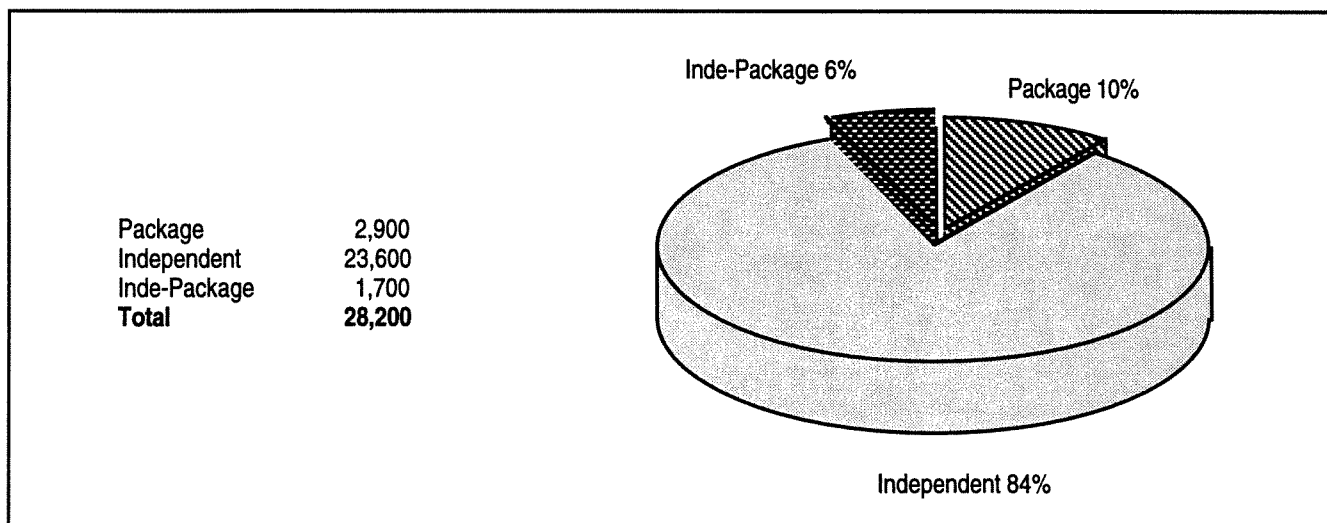
Graph II-6

Intended Travel Type - All Visitors
Fall/Winter 1993-1994



Graph II-7

Intended Travel Type - Vacation/Pleasure Visitors
Fall/Winter 1993-1994



Intended Length of Stay

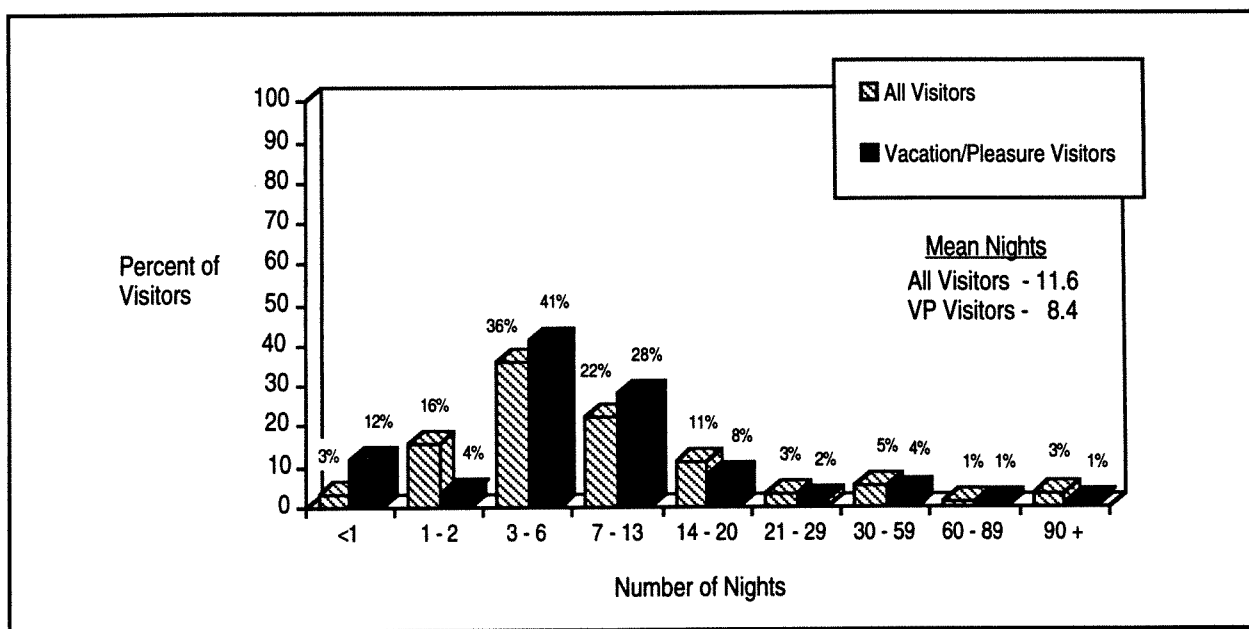
When asked how many nights they would stay in Alaska on this trip, the mean for all visitors to Alaska was almost twelve nights, longer than the average ten nights for Summer 1993 visitors. Among Vacation/Pleasure visitors, the average was about eight nights, possibly a function of the increase in Package visitors who were on prearranged tours. VFRs had the longest intended average, of almost fifteen nights, followed by Business and Pleasure visitors at thirteen nights and Business Only visitors at eleven nights.

Intended length of stay varied by entry mode, with International Air visitors averaging seventeen nights (although the sample size was small) to Highway visitors who averaged about eight nights. Ferry visitors averaged fourteen nights and Domestic Air visitors intended to stay an average of twelve nights.

The majority of visitors (54%) intended to stay six nights or less. One in five visitors planned to spend seven to thirteen nights in Alaska during their stay. One-third of all visitors intended to stay seven to twenty nights.

Graph II-8

Intended Length of Stay
All Visitors and Vacation/Pleasure Visitors
Fall/Winter 1993-1994



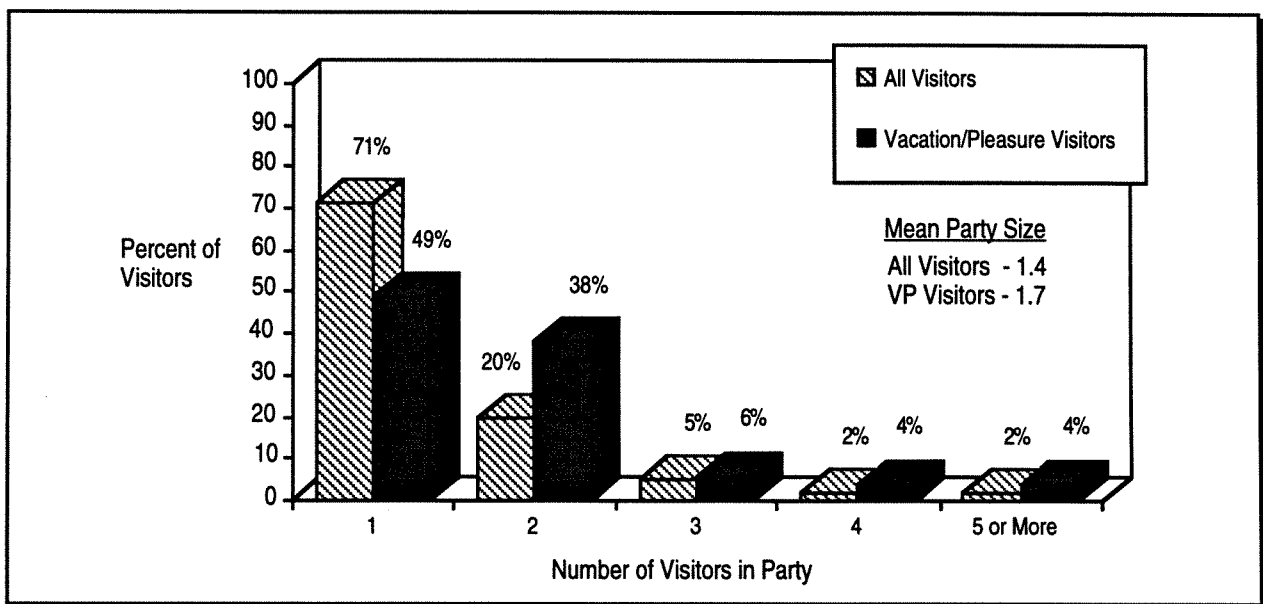
Party Size

The majority of visitors to Alaska traveled alone, while Vacation/Pleasure visitors during F/W 1993-94 tended to travel in pairs. The majority of business travelers (79%) came to Alaska as a singular party size. For the pleasure market, although 57% came to Alaska alone, 29% came in pairs.

Visitors entering by air tended to travel alone. However, there were differences in the other two entry modes. More than one-half (54%) of visitors entering by Highway traveled in party sizes of two or three. While 44% of visitors entering by Ferry were alone, 51% were traveling in party sizes of two or three.

Graph II-9

Visitor Party Size
All Visitors and Vacation/Pleasure Visitors
Fall/Winter 1993-1994



Visitor Characteristics

Repeat Visits to Alaska

The pleasure market was the most motivated to return to Alaska, with 61% of the total market having made a repeat visit to Alaska for pleasure purposes. More than one-half of the Vacation/Pleasure (VP) market were on a repeat trip to Alaska, with an average repeat visit rate of four prior trips in the past five years. Two-thirds of those Visiting Friends and Relatives (VFR) were on a repeat visit, with an average repeat visit rate of three trips in the last five years.

During Summer 1993, only 20% of the Vacation/Pleasure market had repeat visits to Alaska in the last five years. However, 48% of VFRs had repeat visits to Alaska during Summer 1993. VPs, during Summer 1993, averaged only one repeat visit, while VFRs averaged two. Apparently, the Summer visitor market was predominantly first time visitors.

Business and Pleasure visitors, Business Only visitors and Seasonal Workers were much more likely to be on their first visit to Alaska. Business and Pleasure visitors averaged only two prior repeat visits over five years, equal to their average during Summer 1993. Business Only visitors averaged only one prior visit, just as they did during Summer 1993. However, when asked about repeat visits for business purposes, Business Only visitors averaged fifteen repeat visits and Business and Pleasure visitors averaged five repeat visits in the last five years.

Highway was the most likely entry mode to have repeat visitors to Alaska, with an average of fifteen repeat visits. This was most likely a result of the short yet frequent visits made by Canadians residing in the Yukon Territory.

Table II-8

Repeat Visit Rate – By Trip Purpose Percent Visiting for Pleasure in Last Five Years Fall/Winter 1993-1994

Number of Visits	Vacation/ Pleasure	Visiting Friends and Relatives	Business/ Pleasure	Business Only	Seasonal Worker
1 - 2 Visits	17 %	32 %	14 %	6 %	3 %
3 - 4 Visits	11	12	7	2.5	2
5 - 6 Visits	10	11	2	1	–
7 - 8 Visits	5	3	–	<1	–
9 or More Visits	11	9	6	2	–
No Repeat Visits	46 %	34 %	71 %	88 %	94 %
Average Repeat Visit Rate	4	3	2	1	<1

Visitor Origin

The majority of Alaska F/W visitors for 1993-94 (88%) came from the United States. Overall, the West brought the largest number of visitors from the United States, with 57% of the total visitor market. Forty-six percent (46%) originated in Washington, California and Oregon, accounting for 85,100 of the 160,800 from the U.S. Table II-9 details visitor arrivals by place of origin.

The southern states brought the second largest group of U.S. travelers to Alaska (18%). Most southern visitors came from Texas or Florida. The East and Midwest brought the remainder of U.S. visitors (8% and 7% respectively). New York and Pennsylvania were the largest contributors for the eastern market, while Minnesota and Illinois accounted for the largest portion of visitors from the Midwest.

Canada accounted for 5% of all visitors to Alaska during F/W 1993-94. The Yukon Territory and British Columbia were the largest of the Canadian markets for Alaska. The proximity of these provinces contributed to frequent travel into the state by Canadians.

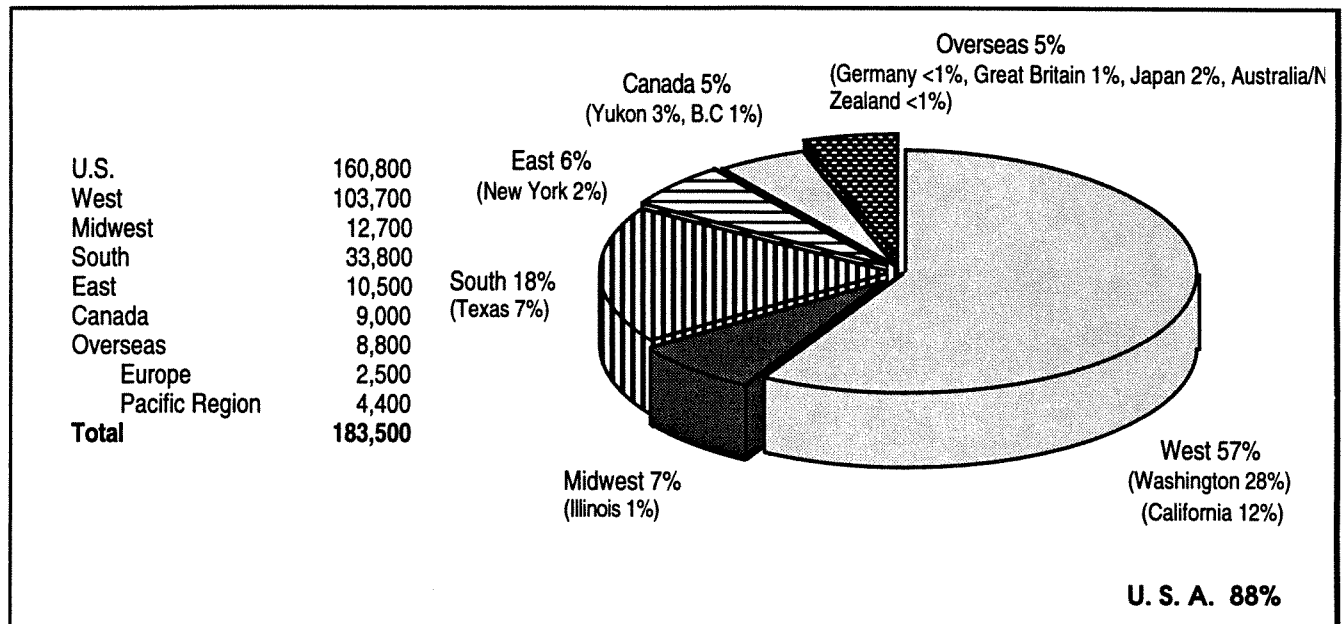
Overseas visitors equaled Canadian visitors, accounting for 5% of the total visitor market. Visitors from Japan were the largest portion of the Overseas markets, accounting for 2% of all visitors. Many of these visitors came to Alaska on Package trips to Southcentral and the Interior.

When Vacation/Pleasure visitor data was analyzed, some interesting distinctions occurred. While visitors from the West accounted for the largest share of the U.S. market (40% of the total VP market), the second largest portion of the VP market came from Canada (20%), followed by Overseas (16%). The majority of Canadian visitors came from the Yukon Territory and British Columbia (19% of all VPs), similar to the total visitor market.

The Overseas market, while relatively small, is an important part of the F/W season, especially the Japanese market. Japanese visitors again were the largest portion of the Overseas market, accounting for 9% of all VPs.

Graph II-10

Visitor Origin - All Visitors Fall/Winter 1993-1994



Graph II-11

Visitor Origin - Vacation/Pleasure Visitors Fall/Winter 1993-1994

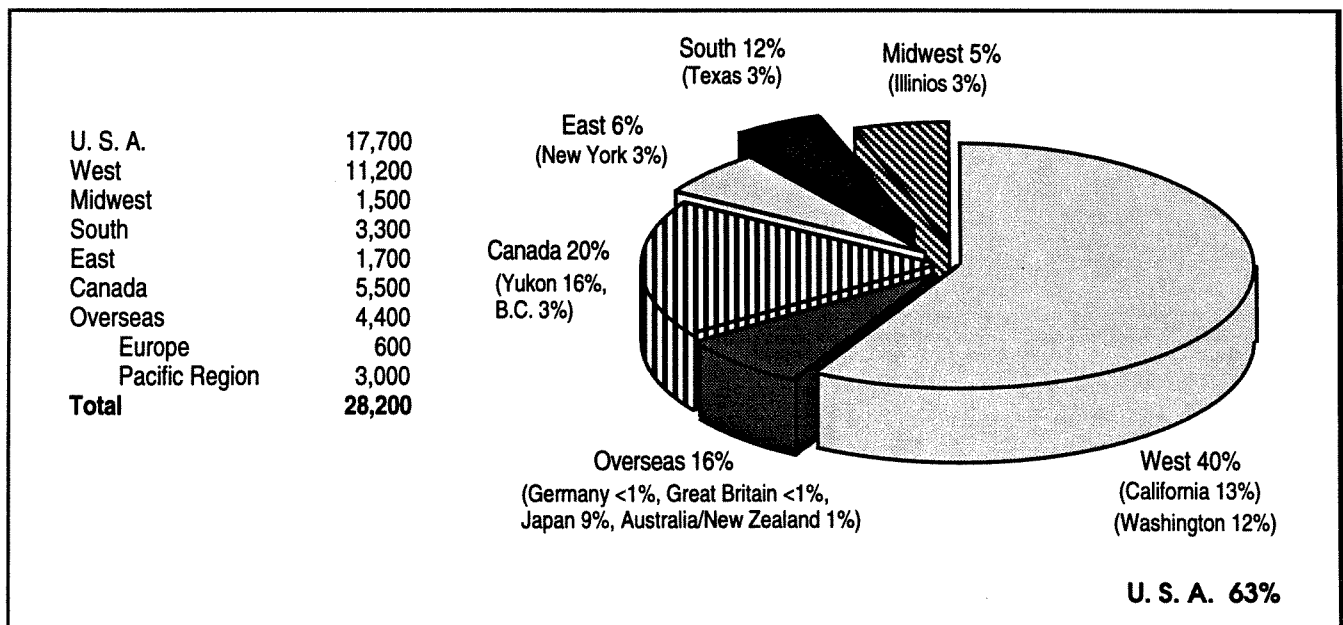


Table II-9

Visitor Arrivals by Place of Origin
Fall/Winter 1993-1994

	Total Visitors	Percent of Total Visitors
West	103,700	56.5%
Washington	51,600	28.1%
California	22,800	12.4
Oregon	10,700	5.8
Hawaii	4,200	2.3
Idaho	3,700	2.0
Colorado	2,400	1.3
Arizona	2,200	1.2
Utah	1,900	1.0
Nevada	1,600	0.9
Montana	1,100	0.6
New Mexico	900	0.5
Wyoming	600	0.3
South	33,800	18.4%
Texas	13,600	7.4%
Florida	2,900	1.6
Virginia	2,900	1.6
Georgia	2,100	1.1
South Carolina	1,900	1.0
Oklahoma	1,600	0.9
North Carolina	1,200	0.7
Maryland	1,000	0.5
Louisiana	800	0.4
Arkansas	700	0.4
District of Columbia	600	0.3
Delaware	400	0.2
Midwest	12,700	6.9%
Minnesota	2,600	1.4%
Illinois	2,400	1.3
Michigan	2,000	1.1
Ohio	1,900	1.0
Iowa	800	0.4
Nebraska	700	0.4
North Dakota	600	0.3
Wisconsin	500	0.3
Missouri	400	0.2
Indiana	300	0.2
South Dakota	300	0.2
Kansas	100	0.1

Table II-9 Continued

Visitor Arrivals by Place of Origin
Fall/Winter 1993-1994

	Total Visitors	Percent of Total Visitors
East	10,500	5.7%
New York	4,300	2.3%
Pennsylvania	1,800	1.0
New Jersey	800	0.4
Massachusetts	1,400	0.8
Maine	700	0.4
New Hampshire	600	0.3
Connecticut	400	0.2
Vermont	400	0.2
Total United States	160,800	87.6%
Canada	9,000	4.9%
Yukon	5,900	3.2%
British Columbia	2,000	1.1
Alberta	800	0.4
Ontario	200	0.1
Northwest Territories	100	0.1
Overseas	8,800	4.8%
Europe	2,500	1.4%
Great Britain	1,100	0.6%
France	400	0.2
Sweden	300	0.2
Switzerland	300	0.2
Norway	200	0.1
West Germany	100	0.1
Spain	100	0.1
Pacific Region	4,400	2.4%
Japan	2,900	1.6%
Korea	600	0.3
Indonesia	300	0.2
Australia	200	0.1
Hong Kong	100	0.1
Russia	1,800	1.0%
Other Overseas	100	0.1%
Bahamas	100	0.1%
Unknown	4,900	2.7%
Total Visitor Arrivals	183,500	100.0%

Visitor Age

Visitors to Alaska averaged 37.6 years of age in F/W 1993-94. Typically, F/W visitors are younger than Summer visitors. This continued to hold true, in that Summer 1993 visitors averaged 48 years of age. Since 1989, the average Alaskan visitor has been getting younger.

F/W 1993-94 Vacation/Pleasure visitors were similar to all visitors in age. The average age for Summer 1993 VPs was 50 years of age. Generally, for all visitors and all VPs, females are slightly older than males, both during Summer 1993 and F/W 1993-94.

The youngest group of F/W visitors entered Alaska by Highway and International Air, while the oldest arrived on the Ferry. During F/W 1993-94, the Alaska Marine Highway System was host to a number of Elderhostel packages, which probably accounted for the age of Ferry travelers.

Business and Pleasure visitors were the youngest of all trip purpose groups, with an average age of 34 years, and VFRs were the oldest at forty years of age.

Visitor Gender

Overall, male visitors outnumbered female visitors to Alaska two to one. This trend has been virtually the same since data was first collected with only minor variations. Males were the majority of visitors in every entry mode, but not in the pleasure market. Two-thirds of those Visiting Friends and Relatives were female and 50% of VPs were female. Overall, 58% of the total pleasure market was female.

Visitor Employment Status

In contrast to the Summer 1993 visitor market, where one-third of all visitors were retired, the F/W 1993-94 market is more than three-quarters employed. Those who were either students, children, or not in the labor force (Other) were 12% of all F/W visitors.

The least likely to be employed were those who entered by Ferry (45% employed; 44% retired), again probably attributable to those traveling in Elderhostel. One in five of those Visiting Friends and Relatives was retired. Although more than one-half of the total pleasure market (59%) were employed, 18% were retired.

Table II-10

**Age of All Party Members
Fall/Winter 1993-1994**

By Entry Mode		Average Age
Domestic Air		37.6
International Air		34.9
Highway		34.8
Ferry		50.3
By Trip Purpose		
Vacation/Pleasure		36.3
Visiting Friends/Relatives		40.2
Business/Pleasure		33.5
Business Only		38.2
Seasonal Worker		32.8

Table II-11

**Visitor Gender and Employment Status
Fall/Winter 1993-1994**

	Percent of Visitors
Visitor Gender	
Male	66%
Female	34
Visitor Employment Status	
Employed	78%
Retired	8
Other	12

Table II-12

Summary Profile: All Visitors (Sampled Visitors Only)

	Percent of Visitors
Main Trip Purpose	
Vacation/Pleasure	15 %
Visiting Friends and Relatives	22
Business and Pleasure	10
Business Only	50
Seasonal Workers	3
Entry Mode	
Domestic Air	91 %
International Air	2
Highway-Personal Vehicles	5
Ferry	2
Intended Exit Mode	
Domestic Air	90 %
International Air	3
Highway-Personal Vehicles	4
Ferry	2
Intended Travel Type	
Package	5 %
Independent	91
Inde-Package	4
Intended Stay	
Average # of Nights	11.6 nights
0-6 Nights	54 %
7-20 Nights	33
Over 20 Nights	13
Party Size	
Average # of Persons	1.4 persons
Repeat Visits (Last 5 Years)	
Repeating for Pleasure	32 %
Repeating for Business	49
Origin	
West	57 %
Midwest	7
South	18
East	6
Canada	5
Overseas	5
Average Age	38 years of age
Gender	
Male	66 %
Female	34
Employment Status	
Employed	78 %
Retired	8
Other	12

¹ Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

² Computed excluding seasonal workers.

³ Computed excluding parties of 10 or more.

Chapter III: Trip Purpose Profiles

Chapter III: Trip Purpose Profiles

Vacation/Pleasure Visitors

Visiting Friends and Relatives

Business/Pleasure Visitors

Business Only Visitors

Visiting Friends and Relatives Visitor Profile

Market Size: Those Visiting Friends and Relatives (VFRs) were 22.2% of the total visitors market to Alaska, the second largest trip purpose group during Fall/Winter 1993-94. During Summer 1993, this group was also the second largest trip purpose group, comprising 11% of the market.

Entry Mode and Intended Exit Mode: Domestic Air was the primary entry and intended exit mode for those Visiting Friends and Relatives. Highway, Ferry and International Air carried only 5% of VFRs into and out of the state. During Summer 1993, Highway, Ferry and International Air carried 10% of VFRs into and out of the state.

Intended Travel Type: Nearly all VFRs were Independent travelers (95%), with another 4% intending to be Inde-Package travelers. Travel type tends to remain consistent with those Visiting Friends and Relatives throughout the year. During Summer 1993, 97% of VFRs were primarily Independent travelers and even during Fall/Winter/Spring 1989-90, less than 1% of VFRs were Package travelers.

Intended Stay: Those Visiting Friends and Relatives planned to stay the longest amount of time of any trip purpose group, an average of nearly fifteen nights. This also has remained consistent as in previously sampled years. VFRs planned to stay longer than any other trip purpose group with the exception of Seasonal Workers.

Party Size: The average party size for those Visiting Friends and Relatives was 1.6. Nearly two-thirds (63%) of VFRs traveled alone while 23% traveled in pairs.

Previous Visits: Clearly, two-thirds of all those Visiting Friends and Relatives had traveled to Alaska for pleasure within the last five years. Nearly seven out of ten VFRs had visited Alaska previously for business and/or pleasure in the past five years.

Origin: Nearly all of those Visiting Friends and Relatives (95%) came from the U.S. Three out of every five VFRs originated from the West, primarily Washington. This remains consistent with previously sampled years. The proportion of VFRs from the South and East has grown, compared to previous years.

Demographics: The average age of the VFR visitor was 40 years, compared to 42 during Summer 1993, and 43 years during Fall/Winter/Spring 1989-90. Just over half (53%) of all VFRs were employed, 22% were retired and 26% were otherwise outside of the labor force. More females came to visit (65%) than males (35%). Overall these demographics are similar to almost all previously sampled years.

Table III-2

Visiting Friends and Relatives Visitor Profile

Fall/Winter 1993-1994

Total VFR Visitors	40,800
Market Size	22.2%
Entry Mode	
Domestic Air	96%
International Air	1
Highway - Personal Vehicles	2
Ferry	2
Intended Exit Mode	
Domestic Air	96%
International Air	1
Highway - Personal Vehicles	2
Ferry	1
Intended Travel Type	
Independent	95%
Inde-Package ¹	4
Package	1
Intended Stay (Mean Nights)²	14.7 nights
Average Party Size³	1.6 persons
Previous Visits to Alaska	
Previous Pleasure Visits	66%
Previous Business Only Visits	7
Total with Previous visits	69
Origin	
U.S.	95%
West	63
California	13
Washington	31
Midwest	9
South	15
East	8
Canada	1
Overseas	2
Pacific Region	1
Japan	<1
Europe	2
Russia	—
Average Age	40.2 years

¹ Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

² Computed excluding seasonal workers.

³ Computed excluding parties of ten or more.

Business and Pleasure Visitor Profile

Market Size: Business and Pleasure visitors (BPs) were the smallest of the four trip purpose groups, at 10.4% of the market with a total of 19,000 visitors. During Summer 1993, Business and Pleasure visitors were 7% of the total visitor market, representing 55,800 visitors.

Entry Mode and Intended Exit Mode: Domestic Air was the primary transportation mode for Business and Pleasure visitors. Nine of every ten BPs entered by Domestic Air and intended to exit the same way. Highway was the second most used transportation mode, with 4% of all Business and Pleasure visitors, followed by International Air and the Alaska Marine Highway System (Ferry).

Intended Travel Type: Most (81%) Business and Pleasure visitors were Independent travelers, with another 8% characterizing themselves as Inde-Package travelers. These figures were consistent with Business and Pleasure visitors during Summer 1993 and Fall/Winter/Spring 1989-90. Only 11% of BPs were Package visitors during Fall/Winter 1993-94.

Intended Stay: During Fall/Winter 1993-94, Business and Pleasure visitors planned the second longest stay of any trip purpose group, averaging thirteen nights. Two out of every five Business and Pleasure visitors intended to extend their stay to visit friends and relatives, while more than half added days to the business portion of their travel for pleasure activities.

Party Size: The average party size for Business and Pleasure visitors was 1.3, with 71% being single travelers and 20% traveling with someone else. During Summer 1993, Business and Pleasure travelers tended to travel in pairs, with an average party size of 1.7.

Previous Visits: More than one-quarter of Business and Pleasure visitors had taken a trip to Alaska for pleasure in the last five years. More than one-half had traveled to Alaska for business in the past five years. Nearly 60% had traveled to Alaska for business and/or pleasure in the previous five years. These results were very similar to those for Summer 1993.

Origin: Nine of every ten Business and Pleasure visitors were from the U.S., with 56% originating from the West. Almost one-third (31%) of BPs were from Washington. One in five Business and Pleasure visitors are from the South. The Midwest, East and Canada each contributed 6% of BPs, while only 3% of all BPs were from Overseas.

Demographics: Business and Pleasure visitors were the youngest trip purpose group, with an average age of 33.5 years. Nearly three-quarters of all Business and Pleasure visitors were male and 77% were employed. Summer 1993 Business and Pleasure visitors were older, with an average age of 40 years, yet were also more likely to be male and employed.

Table III-3

Business and Pleasure Visitor Profile Fall/Winter 1993-1994

Total Business and Pleasure Visitors	19,000
Market Size	10.4%
Entry Mode	
Domestic Air	92%
International Air	3
Highway - Personal Vehicles	4
Ferry	2
Intended Exit Mode	
Domestic Air	91%
International Air	3
Highway - Personal Vehicles	4
Ferry	1
Intended Travel Type	
Independent	81%
Inde-Package ¹	8
Package	11
Intended Stay (Mean Nights)²	13.0 nights
Average Party Size³	1.3 persons
Previous Visits to Alaska	
Previous Pleasure Visits	28%
Previous Business Only Visits	55
Total with Previous visits	58
Origin	
U.S.	90%
West	56
California	12
Washington	31
Midwest	6
South	22
East	6
Canada	6
Overseas	3
Pacific Region	2
Japan	1
Europe	—
Russia	2
Average Age	33.5 years

¹ Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

² Computed excluding seasonal workers.

³ Computed excluding parties of ten or more.

Business Only Visitor Profile

Market Size: In Summer 1993, Business Only visitors were 10% of the total visitor market, accounting for 84,900 visitors. During Fall/Winter 1993-94, Business Only visitors were 49.5% of the market. There were 90,900 Business Only visitors.

Entry Mode and Intended Exit Mode: Nearly all Business Only travelers entered and intended to exit by Domestic Air. Only a few Business Only visitors planned to leave the state by International Air (1,400), Highway (500) or Ferry (200).

Intended Travel Type: Most (93%) Business Only visitors were Independent visitors, yet a few (2%) characterized themselves as Inde-Package visitors. These visitors may have started the trip as a purely business trip, yet were hoping to find time to take a day tour. Of the 5% who characterized their travel type as Package, some Business Only visitors have their travel and lodging arrangements planned for them by travel agents or other company personnel and therefore classified their travel type as Package travel. However, in reality these visitors are Independent travelers since they probably did not pay a single price in advance. While every effort was made to correctly categorize travel type, some element of error may remain.

Intended Stay: The average intended length of stay for Business Only visitors was nearly eleven nights, the third longest stay of any trip purpose group. Two out of every five Business Only visitors planned to stay three to six nights, while one out of every four planned to spend only one to two nights. During Summer 1993, Business Only visitors averaged nine nights in Alaska.

Party Size: Business Only visitors were more likely to travel alone, with an average party size of 1.3. This average has remained the same since Summer 1989.

Previous Visits: More than three-quarters (76%) of Business Only visitors have visited Alaska within the last five years for business, more than any other trip purpose group. Similarly, only 12% of Business Only visitors have made repeat visits to the state for pleasure, fewer than any other trip purpose groups. These figures were consistent with those for Summer 1993 and Fall/Winter/Spring 1989.

Origin: Nine out of ten Business Only travelers originated from the U.S. Nearly three out of every five came from the West, particularly from Washington (30%). One in five Business Only visitors came from the South. All other regions of origin (Midwest, East, Canada and Overseas) each produced less than one-tenth of the Business Only visitors.

Demographics: Business Only visitors averaged 38 years old, consistent with the average age of 37 during Summer 1993 and 1989. Business Only visitors were much more likely to be male (86%) and virtually all were employed (98%).

Table III-4

Business Only Visitor Profile Fall/Winter 1993-1994

Total Business Only Visitors	90,900
Market Size	49.5%
Entry Mode	
Domestic Air	98%
International Air	1
Highway - Personal Vehicles	1
Ferry	<1
Intended Exit Mode	
Domestic Air	97%
International Air	2
Highway - Personal Vehicles	1
Ferry	<1
Intended Travel Type	
Independent	93%
Inde-Package ¹	2
Package	5
Intended Stay (Mean Nights)²	10.9 nights
Average Party Size³	1.3 persons
Previous Visits to Alaska	
Previous Pleasure Visits	12%
Previous Business Only Visits	76
Total Previous Business and/or Pleasure Visits	78
Origin	
U.S.	92%
West	58
California	13
Washington	30
Midwest	7
South	22
East	5
Canada	2
Overseas	3
Pacific Region	1
Japan	<1
Europe	1
Russia	1
Average Age	38.2 years

¹ Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

² Computed excluding seasonal workers.

³ Computed excluding parties of ten or more.



Chapter IV: Domestic Air Analysis By Season

Summary Profile

Seasonal Analysis

Introduction

This chapter provides a seasonal analysis of Fall/Winter visitors arriving by domestic airlines. Ninety-one percent (91%), for a total of 167,100, of Alaska's Fall/Winter visitors arrived via domestic airlines.

A profile of the average Domestic Air visitor is presented which includes trip purpose, transportation modes, and demographics. Following the profile is a seasonal analysis depicting Fall visitors and Winter visitors.

The Fall season is defined as **October, November, and December.**

The Winter season is defined as **January, February, March, and April.**

These seasonal definitions differ slightly from the season used in the 1985-86 *Alaska Visitors Statistics Program (AVSP I)* and 1989-90 *Alaska Visitors Statistics Program (AVSP II)*. Therefore, the data presented is not completely comparable to the data of previous years.

Trend tables provided in Chapters I and II have been adjusted to reflect the seasonal definition used in this analysis.

Summary Profile

Market Size: Nine out of every ten Fall/Winter visitors to Alaska arrived by Domestic Air. More than 167,100 visitors came to Alaska on domestic airlines. During Summer 1993, Domestic Air was the most widely used entry mode, carrying more than one-half (53%) of all visitor arrivals or 443,600 people.

Trip Purpose: Nearly two-thirds (64%) of all Fall/Winter Domestic Air arrivals traveled for business-related purposes. More than 88,800 visitors constituted Business Only visitors, the largest trip purpose group entering the state by Domestic Air. During Fall/Winter 1993-94, 56,900 pleasure-related visitors arrived by Domestic Air, including 39,100 of those Visiting Friends and Relatives and 17,800 for Vacation/Pleasure.

Entry Mode and Intended Exit Mode: Nearly all visitors arriving by Domestic Air planned round-trip travel by. One percent (1%) intended to leave the state by International Air. Less than 1% planned to exit using either Highway, Ferry or Cruise Ship. During Summer 1993, 83% of Domestic Air visitors were round-trip passengers and 13% planned to leave via Cruise Ship.

Intended Travel Type: The majority of Domestic Air arrivals were Independent travelers (96%), of which 4% intended to purchase sightseeing tours while instate. The remaining 4% were traveling on a Package. In comparison, Fall/Winter Highway visitors were 100% Independent and Ferry visitors were 72% Independent, and 27% Package. During Summer 1993, 75% of Domestic Air entries were Independents and 25% were Package.

Intended Stay: The average intended stay for Domestic Air visitors was nearly twelve nights. International Air arrivals had the longest average stay of seventeen nights, followed by Ferry arrivals at fourteen nights. The shortest average intended stay of eight nights was by Highway arrivals. During Summer 1993, the average stay for Domestic Air arrivals was eleven nights, less time than visitors arriving by all other entry modes except Cruise Ship.

Party Size: Domestic Air visitor arrivals had an average party size of 1.4, reflecting the influence of the business-related visitors. The largest party size was by Highway arrivals, at 2.3 persons. During Summer 1993, Domestic Air visitors had an average party size of 1.9, which was the smallest of all entry mode groups.

Previous Visits: Nearly one-third (30%) of all Domestic Air arrivals had visited Alaska for pleasure in the last five years. These visitors were the most likely to have previously visited Alaska for business (51%), than arrivals by any other entry mode. Only Highway had arrivals with more previous visitors for business and/or pleasure than Domestic Air, 86% vs. 71%.

Origin: The majority (93%) of Domestic Air arrivals originated in the U.S. Three out of every five Domestic Air arrivals came from the West with three out of every ten coming from Washington. One of every five Fall/Winter Domestic Air arrivals came from the South. These figures are consistent with those during Summer 1993.

Demographics: The typical Fall/Winter visitor arriving by Domestic Air was an employed male approximately 38 years of age. During Summer 1993, the average Domestic Air arrival was an employed male, about 44 years of age.

Table IV-1

Domestic Air Visitor Profile

Fall/Winter 1993-1994

Total Domestic Air Visitors	167,100
Market Size	91%
Main Trip Purpose	
Vacation/Pleasure	11%
Visiting Friends and Relatives	23
Business and Pleasure	11
Business Only	53
Seasonal Worker	2
Entry Mode (of Domestic Air Exits)	
Domestic Air	99%
International Air	<1
Highway - Personal Vehicles	<1
Ferry	<1
Intended Exit Mode	
Domestic Air	98%
International Air	1
Highway - Personal Vehicles	<1
Ferry	<1
Cruise Ship	<1
Intended Stay (Mean Nights)¹	11.6 nights
Average Party Size²	1.4 persons
Previous Visits to Alaska	
Previous Pleasure Visits	30%
Previous Business Only Visits	51
Total with Previous visits	71
Origin	
U.S.	93%
West	60
California	13
Washington	30
Midwest	7
South	20
East	6
Canada	1
Overseas	3
Pacific Region	1
Japan	1
Europe	1
Russia	<1
Average Age	37.6 years

¹ Computed excluding seasonal workers.

² Computed excluding parties of ten or more.

Seasonal Analysis

Fall Visitors Arriving by Domestic Air

Domestic Air brought 71,900 visitor to Alaska during the Fall season, 43% of the total F/W 1993.

Because the Fall season includes Thanksgiving and Christmas, those Visiting Friends and Relatives were a higher proportion of arrivals than in Winter. Twenty-nine percent (29%) of Fall visitors were in Alaska as VFRs.

The typical Fall visitor planned to enter and exit Alaska by Domestic Air. This visitor traveled alone, as an Independent and averaged nine nights in Alaska.

Nearly two in five Fall visitors have been to Alaska for pleasure sometime in the last five years and nearly one-half of them for business.

Fall visitors tended to be male, employed and approximately 39 years of age.

During the Fall season, most visitors arriving by Domestic Air came from the western region of the United States.

Winter Visitors Arriving by Domestic Air

Domestic Air brought in more than 95,000 of all arriving visitors during Winter 1993-94. The majority were Business Only travelers, and therefore had an average party size of one, were employed and traveled as Independents.

Package and Inde-Package visitors were each 5% of the total Winter market, probably due to specific winter package tours marketed to Overseas visitors. This also may account for the length of the average intended stay of fourteen nights.

Nearly one-quarter of the Winter Domestic Air market were repeat pleasure visitors and 55% were repeat business visitors.

The West is an important market for the Winter Domestic Air market, however there is also increasing evidence of the southern market, which accounted for 23% of the total market.

Table IV-2

Summary Profile: Domestic Air Visitors by Season (Sampled Visitors Only)

	Fall	Winter	Total
Market Significance			
Total Visitors	43 %	57 %	100 %
Main Trip Purpose			
Vacation/Pleasure	14 %	9 %	11 %
Visiting Friends and Relatives	29	19	23
Business and Pleasure	10	11	11
Business Only	47	58	53
Seasonal Worker	<1	4	2
Intended Exit Mode			
Domestic Air	99 %	98 %	98 %
International Air	1	1	1
Cruise Ship	-	<1	<1
Highway - Personal Vehicles	-	<1	<1
Ferry	-	<1	<1
Intended Travel Type			
Package	3 %	5 %	4 %
Inde-Package ¹	1	5	4
Independent	96	89	92
Intended Stay²			
Average # of Nights	9.2 nights	13.5 nights	11.6 nights
0-6 Nights	54 %	53 %	53 %
7-20 Nights	37	32	34
Over 20 Nights	10	15	13
Party Size			
Average # of Persons	1.4 persons	1.3 persons	1.4 persons
Repeat Visits (Last 5 Years)			
Repeating for Pleasure	38 %	24 %	30 %
Repeating for Business	46	55	51
Repeating, Total	71	70	70
Origin			
West	67 %	55 %	60 %
Midwest	6	8	7
South	16	23	20
East	6	6	6
Canada	1	1	1
Overseas	2	3	3
Average Age	39 years	37 years	38 years
Gender			
Male/Female	65/35	67/33	66/34
Employment Status			
Employed	77 %	84 %	81 %
Retired	9	5	7
Other	11	11	11

¹ Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.
² Computed excluding seasonal workers.



Chapter V: Full Year Arrivals

Full Year Total Arrivals

Full Year Visitor Arrivals

Visitor Arrivals by Transportation Mode

Visitor Arrivals by Trip Purpose

Visitor Arrivals by Place of Origin

Introduction

This chapter provides an analysis of the total arrivals into Alaska, both resident and non-resident, for the full year of May 1993 to April 1994. Included are summaries on the full year total arrivals and visitor arrivals, resident/visitor arrival composition, visitor arrivals by entry mode, Vacation/Pleasure and Visiting Friends and Relatives markets, visitor arrivals by trip purpose, and visitor arrivals by origin.

The full year definition differs slightly from the full year definition used in the 1985-86 *Alaska Visitors Statistics Program (AVSP I)* and 1989-90 *Alaska Visitors Statistics Program (AVSP II)*. Therefore, the data presented is not completely comparable to the data of previous years.

Trend tables provided in Chapters I and II have been adjusted to reflect the seasonal definition used in this analysis.

Full Year Total Arrivals

Between May 1993 and June 1994, a total of 1.8 million residents and visitors entered Alaska. Compared to the 1.3 million who arrived between June 1989 and May 1990, this represents an increase of 28%, an annual average growth rate of 7%.

The majority, 67.4%, arrived by Domestic Air, followed by Cruise Ship with 13.8%, and Highway, 11.3%. Domestic Air accounted for 58% of all Summer arrivals and 88% of all Fall/Winter arrivals. When compared to the 919,000 who arrived by Domestic Air between June 1989 and May 1990, the 1.2 million Domestic Air arrivals during 1993-94 reflects an overall increase of 31%.

International Air accounted for less than 2% of Alaska arrivals. Between 1985-86 and 1989-90, International Air arrivals increased by 44%. Between (June-May) 1989-90 and (May-April) 1993-94, yearly arrivals decreased by 12,068, a 31% decline in arrivals.

Cruise Ship arrivals has increased by nearly 90,000 total arrivals between (June-May) 1989-90 and (May-April) 1993-94, a 57% expansion of arrivals. Highway arrivals grew by 12% between the same time periods.

The Alaska Marine Highway System (Ferry) experienced a 5% decline in total arrivals between 1989-90 and 1993-94.

Full Year Visitor Arrivals

Approximately 97% of all Summer 1993 and 96% of all Fall/Winter 1993-94 arrivals were included in the population sampled in the *Random Arrival Survey*. Alaska received a total of 1.5 million non-resident visitors between May 1993 and April 1994. This represented a 30.3% increase over the (June-May) 1989-90 total of 807,000 visitors.

Visitor Arrivals by Transportation Mode

Domestic Air brought 58% of Alaska's visitors into the state, more than 600,000 visitors. In 1989-90, just under 475,000 visitors arrived in Alaska via a domestic airline. Cruise Ship was the second most important arrival mode, accounting for nearly one-quarter of a million visitors during 1993-94, compared to the 156,000 Cruise Ship arrivals during 1989-90.

Highway was the third most popular arrival transportation mode for visitors, with a total of 112,600 visitors arriving by personal vehicle. During 1989-90, 85,400 visitors arrived in Alaska via the Alaska, Taylor and Klondike Highways.

More than 33,000 visitors came to Alaska on the Alaska Marine Highway System (Ferry) during 1993-94. During 1989-90, there were slightly more visitors arriving by Ferry, a total of 33,700.

International Air accounted for only 1.6% of all visitor arrivals, with less than 17,000 visitors during 1993-94. During 1989-90, 27,300 visitors arrived in Alaska on an international airline.

Table V-1

Full Year Total Arrivals and Visitor Arrivals Summary
Summer 1993 and Fall/Winter 1993-1994

Summer 1993

Mode of Arrival	Total Arrivals	% of Total Arrivals	Visitors	% of Total Visitors
Domestic Air	697,451	57.8%	443,642	51.5%
International Air	19,458	1.6	13,264	1.5
Cruise Ship	246,967	20.5	246,967	28.7
Highway-Personal Vehicles	172,072	14.6	103,972	12.1
Ferry	35,905	3.0	29,075	3.4
Total Sampled Arrivals	1,171,853	97.4%	836,920	97.2%
Total Unsampled Arrivals	35,675	3.0	24,197	2.8
Total All Arrivals	1,207,528	100.0%	861,117	100.0%

Fall/Winter 1993-1994

Mode of Arrival	Total Arrivals	% of Total Arrivals	Visitors	% of Total Visitors
Domestic Air	506,198	87.6%	167,126	87.7%
International Air	7,521	1.3	3,618	1.9
Highway-Personal Vehicles	29,494	5.1	8,625	4.5
Ferry	12,603	2.2	4,109	2.2
Total Sampled Arrivals	555,816	96.2%	183,478	96.3%
Total Unsampled Arrivals	21,847	3.8	7,008	3.7
Total All Arrivals	577,663	100.0%	190,486	100.0%

Full Year Total

Mode of Arrival	Total Arrivals	% of Total Arrivals	Visitors	% of Total Visitors
Domestic Air	1,203,649	67.4%	610,768	58.1%
International Air	26,979	1.5	16,882	1.6
Cruise Ship	246,967	13.8	246,967	23.5
Highway-Personal Vehicles	202,176	11.3	112,597	10.7
Ferry	48,508	2.7	33,184	3.2
Total Sampled Arrivals	1,728,279	96.8%	1,020,398	97.0%
Total Unsampled Arrivals	57,522	3.2	31,205	3.0
Total All Arrivals	1,785,801	100.0%	1,051,503	100.0%

Table V-2

Full Year Resident/Visitor Arrival Composition Summary
Summer 1993 and Fall/Winter 1993-1994

Summer 1993

Sampled Arrival Mode	Total Arriving Passengers	Total Visitors	Percent Visitors
Domestic Air	697,451	443,642	63.6%
International Air	19,458	13,264	68.2
Cruise Ship	246,967	246,967	100.0
Highway-Personal Vehicles	172,072	103,972	60.4
Ferry	35,905	29,075	81.0
Total Sampled	1,171,853	836,920	71.4%

Fall/Winter 1993-1994

Sampled Arrival Mode	Total Arriving Passengers	Total Visitors	Percent Visitors
Domestic Air	506,198	167,126	33.0%
International Air	7,521	3,618	48.1
Highway-Personal Vehicles	29,494	8,625	29.2
Ferry	12,603	4,109	32.6
Total Sampled	555,816	183,478	33.0%

Full Year Total

Sampled Arrival Mode	Total Arriving Passengers	Total Visitors	Percent Visitors
Domestic Air	1,203,649	610,768	50.7%
International Air	26,979	16,882	62.6
Cruise Ship	246,967	246,967	100.0
Highway-Personal Vehicles	202,176	112,597	55.7
Ferry	48,508	33,184	68.4
Total Sampled	1,728,279	1,020,398	59.0%

Table V-3

**Full Year Visitor Arrivals Summary
By Entry Mode
(Sampled Arrivals Only)
Summer 1993 and Fall/Winter 1993-1994**

Entry Mode	Summer Total	Fall/Winter Total	Year Total	Full Year % Change 89-90 to 93-94¹
Domestic Air	443,600	167,100	610,700	+43.9 %
International Air	13,300	3,600	16,900	+77.0
Cruise Ship	247,000	—	247,000	+76.7
Highway	104,000	8,600	112,600	+12.9
Ferry	29,100	4,100	33,200	+14.1
Total Arriving				
Visitors	836,900	183,500	1,020,400	+48.0 %

¹ The full year sample for 1989-90 was June 1989 to May 1990. The full year sample for 1993-94 was May 1993 to April 1994.

Visitor Arrivals by Trip Purpose

The single most important reason for visitor travel to Alaska was Vacation/Pleasure. Just over 60%, or 622,400, of Alaska visitors traveled to Alaska for Vacation/Pleasure. During 1989-90, 403,200 visitors came to Alaska for Vacation/Pleasure.

In order to present a complete picture of the pleasure-related market, the focus of tourism marketers, information was gathered on the secondary purpose of visitor travel. Many Vacation/Pleasure visitors also intended to visit friends and relatives during their trip. Those on primarily business travel planned to add a few days to their trip for pleasure purposes, such as sightseeing or fishing. Including both those whose primary purpose was Vacation/Pleasure with those visitors who have a secondary pleasure-related purpose allows for a truer picture of the total pleasure market.

Another portion of the total pleasure travel market for Alaska were those visitors who came to see friends and relatives (VFRs). During 1993-94, 129,600 visitors arrived in Alaska to visit friends and relatives, a decrease of 7% compared to the 131,200 visitors who arrived during 1989-90.

Between May 1993 and April 1994, approximately 268,400 visitors traveled to Alaska for business-related reasons, 26% of the total visitor market. Business Only visitors accounted for 17% of the total visitor market.

In total, more than one million visitors came to Alaska. Three-quarters of these visitors traveled for pleasure-related reasons.

Table V-4

**Full Year Vacation/Pleasure and VFR Markets
Summer 1993 and Fall/Winter 1993-1994**

Vacation/Pleasure Markets		
Primary market (stated Main Purpose)		622,400
Secondary Market		98,600
Stated secondary purpose of:		
Business & Pleasure Visitors	47,900	
Visiting Friends and Relatives	50,700	
VFR Markets		
Primary market (stated Main Purpose)		129,600
Secondary Market		155,100
Stated secondary purpose of:		
Vacation/Pleasure Visitors	129,100	
Business & Pleasure Visitors	26,000	

Table V-5

**Full Year Visitor Arrivals Summary
By Trip Purpose
(Sampled Arrivals Only)
Summer 1993 and Fall/Winter 1993-1994**

Trip Purpose	Summer Total	Fall/Winter Total	Year Total	Full Year % Change 89-90 to 93-94¹
Vacation/Pleasure	594,200	28,200	622,400	+73.4 %
Visiting Friends and Relatives	88,800	40,800	129,600	-6.9
Business and Pleasure	55,800	19,000	74,800	+1.9
Business Only	84,900	90,900	175,800	+27.1
Seasonal Worker	13,200	4,600	17,800	-52.5
Total Visitors	536,900	183,500	1,020,400	+36.2 %

¹ The full year sample for 1989-90 was June 1989 to May 1990. The full year sample for 1993-94 was May 1993 to April 1994.

Visitor Arrivals by Origin

Eight out of ten visitors to Alaska came from the United States during (May-April) 1993-94, which was approximately the same percentage as during (June-May) 1989-90. Two out of every five visitors to Alaska came from the West, as compared to 47% who came from the West during 1989-90. California and Washington were still the leading markets for Alaska visitors, consistent with prior years survey results.

The South took a larger portion of the visitor market during 1993-94, 20%, than in prior years (17% during 1989-90). The Midwest experienced a slight increase, from 13% during 1989-90 to 14% during 1993-94. Similar findings were found for the East, which had 9% of the visitor market during 1989-90 and 10% during 1993-94.

The international market remained quite consistent in its proportions of the visitor market between 1989-90 and 1993-94. The Canadian market had 8% of the visitor market during 1989-90 and 9% during 1993-94. However, there were 64,000 visitors during 1989-90, which grew to 90,000 visitors during 1993-94.

During 1989-90, 45,800 visitors, 6% of the total market, originated from Overseas. By 1993-94, the Overseas proportion of the market is still about 6%, however there were 62,100 visitors.

Table V-6

**Full Year Visitor Arrivals Summary
By Origin
(Sampled Arrivals Only)
Summer 1993 and Fall/Winter 1993-1994**

Origin	Summer Total	Fall/Winter Total	Year Total	Percent of Total
West	307,600	103,700	411,300	40.3 %
California	117,200	22,800	140,000	13.7
Washington	87,200	51,600	138,800	13.6
Oregon	29,400	10,700	40,100	3.9
Colorado	19,500	2,400	21,900	2.1
Arizona	14,000	2,200	16,200	1.6
South	168,000	33,800	201,800	19.8
Florida	41,600	2,900	44,500	4.4
Texas	38,400	13,600	52,000	5.1
Virginia	12,500	2,900	15,400	1.5
Georgia	12,100	2,100	14,200	1.4
Midwest	126,300	12,700	139,000	13.6
Illinois	21,400	2,400	23,800	2.3
Ohio	21,200	2,600	23,800	2.3
Michigan	19,000	2,000	21,000	2.1
Minnesota	18,600	2,600	21,200	2.1
East	92,900	10,500	103,400	10.1
New York	33,300	4,300	37,600	3.7
Pennsylvania	18,600	1,800	20,400	2.0
New Jersey	18,200	800	19,000	1.9
Massachusetts	10,000	1,400	11,400	1.1
Total United States	694,900	160,800	855,400	83.8
Canada	80,700	9,000	89,700	8.8
British Columbia	25,400	2,000	27,400	2.7
Yukon	19,100	5,900	25,000	2.5
Overseas	53,300	8,800	62,100	6.1
Germany	10,500	100	10,600	1.0
Great Britain	8,500	1,100	9,600	0.9
Switzerland	5,400	300	5,700	0.6
Australia/New Zealand	8,000	200	8,200	0.8
Japan	6,000	2,900	8,900	0.9
Unknown	8,000	4,900	12,900	1.3
Total Visitor Arrivals	836,900	183,500	1,020,400	100.0 %



Appendix

Methodology Summary

Acknowledgments

Survey Instruments

Appendix

Methodology Summary

The Arrival Count (AC) is the method of counting all passengers (visitors and residents) who entered the state. The count is conducted by obtaining passenger counts from airlines, ferry carriers, and motor vehicle arrivals through U.S. Customs records.

The *Random Arrival Survey (RAS)* then determines whether passengers are residents or visitors. Ratios of visitors to residents are calculated from this survey for each entry mode and location. These ratios are applied to the Arrival Count figures to develop the actual visitor figures. Since scientific sampling reflects the total population characteristics accurately, a high level of confidence exists in the true composition of all arrival figures. The resulting data in this report can be considered accurate within $\pm 0.5\%$ to $\pm 2.6\%$ at the 95% confidence level.

The *Random Arrival Survey* methodology is based on personally interviewing statistically selected passengers arriving by major modes as they arrive at their first point of entry by Domestic Air, Highway, Ferry (Alaska Marine Highway System) and International Air. Sampling is done at Anchorage, Fairbanks, Juneau, Ketchikan, Klondike Highway, Alaska Highway and Taylor Highway, as well as on the Ferry from Bellingham and Prince Rupert to Ketchikan. Sampling for this report was conducted from October 1993 through April 1994. Traffic sampled at these locations is estimated to account for 96% of all traffic entering Alaska by these modes.

The personal interview technique was selected as the methodology which would best minimize non-response and omit self selection bias, two problems common to travel research projects. Personal interviewing allows for control of the interviewing environment and scientifically accurate selection of respondents. Equally important, personal RAS interviewing has a positive effect on response to the *Visitor Opinion Survey* and *Visitor Expenditure Survey* phases of the program.

Methodologies by Mode

RAS interviewing methodology is the same for each of the four modes surveyed. However, scientific sampling design and interview interception point vary by mode. The following provides an overview of the arrival count, sample design, and fielding methodologies by modes.

Domestic Air

Domestic Air arrival counts were obtained through a voluntary confidential reporting system. All Domestic Air carriers participated, making possible an analysis of the complete Domestic Air Alaska visitor market.

During the fall and winter months of October through April, the *Random Arrival Survey* was administered by uniformed, professionally trained interviewers who met scientifically selected flights on 22 randomly selected sample days at four points in Alaska: Anchorage, Fairbanks, Juneau and Ketchikan. Passengers were identified as residents or visitors. As part of the sampling process the interviewer team presented the interviewer with a small Alaska lapel pin. The number of visitors interviewed from each flight was four. Through the sampling process, each visitor disembarking the airplane had an equal change of being interviewed. Approximately 96% of the visitors selected through this procedure completed the RAS interview.

Alaska Marine Highway System

Arrival count data for the Marine Highway was obtained from computer scanned passenger tickets generated by the Marine Highway Manager's office in Juneau.

From October through April, uniformed interviewers rode the ferry between Bellingham and Ketchikan, and Prince Rupert and Ketchikan on 16 randomly selected voyages. Voyages were selected in proportion to passenger load. During the sailing, interviewers followed a predetermined skip pattern in each section of the vessel to determine resident/visitor composition and ensure random selection of respondents. Passengers were approached according to the skip pattern and the RAS was administered using the same procedure as other modes. Fall/Winter season target samples per voyage were 20 on the Bellingham-Ketchikan run and 15 on the Prince Rupert-Ketchikan run. All passengers approached agreed to complete the interview, with none refusing.

Highway

Arrival count data was obtained from the U.S. Customs Port Director's offices in Alcan and Skagway.

Two highway locations were sampled from October through April: The border stations on the Alaska Highway at Alcan and the Klondike Highway at Skagway. Twenty-four sample periods were selected based upon traffic patterns and weighted in proportion to traffic volume. A tally of highway traffic was kept to determine resident/visitor composition. Every "nth" vehicle was administered the RAS by a uniformed interviewer immediately after clearing customs at Alcan and Skagway. Only those highway travelers who were entering Alaska for the first time (rather than having arrived via Ferry or visited somewhere in Alaska previously on this trip) were interviewed. The procedure for administering the RAS was the same as previous modes. Most visitors approached agreed to be interviewed with a refusal rate of 3%.

Motorcoach passengers were not interviewed for the Fall/Winter 1993-94 RAS. However, during each sampled period, all motorcoaches were stopped and drivers were asked the origin of the motorcoach, the number of passengers and whether the motorcoach was entering Alaska for the first time on this trip. This information was used to determine the size of the first arrival motorcoach market.

International Air

International Air arrival count data was obtained through the office of the Development Specialist at the Anchorage International Airport.

From October through April, International Air passengers were administered the RAS on 30 statistically selected sample days by uniformed interviewers. All passengers deplaning on sample days were asked resident/visitor status as they left U.S. Customs and every "nth" visitor was interviewed. Five to twenty interviews were conducted each sample day, depending on flight schedules. To minimize non-response and ensure a representative sample of all visitors, interviewers were assisted by foreign language questionnaires (in Japanese, German and Russian), signs in the terminal area, and Japanese, German, Russian and French-speaking interviewers. Refusal rate on International Air was slightly higher than other modes, approximately 8%, primarily due to cultural considerations.

Data Weighting Procedure

Following sample design and actual fielding, raw RAS results were then submitted to a statistical weighting procedure in the data processing phase. This sample weighting ensured accurate expansion of sample results to the arriving passenger population.

The weighting is a multistage procedure and includes voyage and flight passenger loads, detailed arrival count by mode, and resident/visitor sample proportions at all sample points by mode, location and time period.

Sample Size and Reliability

The final result of the October-April 1993-94 season RAS program was a statistically reliable random sample of 1,508 arriving visitors with a maximum margin of error of $\pm 2.6\%$ and a probable margin of error for most results of $\pm 0.5\%$ to $\pm 2.6\%$. The standard margin of error accepted for most scientifically controlled market studies is usually much greater, $\pm 5.0\%$.

Table A-I

Random Arrival Survey Sample Distribution
Fall/Winter 1993-94

Mode	Number of Interviews
Domestic Air	776
Highway	251
Ferry	310
International Air	171
Total	1,508

Table A-II

**RAS Sample Minimum and Maximum Error Levels
At 95% Confidence Level**

When Survey Result is:	The Maximum Margin of Error Is:
1% or 99%	±0.5%
10% or 90%	±1.6%
20% or 80%	±2.1%
30% or 70%	±2.4%
40% or 60%	±2.5%
50% or 50%	±2.6%

This table reads: Given the sample size of 1,508, readers may be 95% certain than any statewide survey result is within a maximum of $\pm 2.6\%$ of the true mean of the survey population. For example, the survey results show that 56.5% of the visitors originated in the Western U.S. Readers can be 95% certain that the true proportion of Westerners is between 53.9% and 59.1%.

The RAS was designed to yield reliable subsamples of each entry mode's visitors. The margin of error rated for entry and trip purpose categories are as follows. These should be considered when examining results in these subcategories.

Table A-III

**RAS Sample Minimum and Maximum Error Levels
By Mode and Main Trip Purpose
At 95% Confidence Level**

Mode	Margin of Error When Survey Result Is:		
	Sample Size	1% of 99%	50%
Domestic Air	776	±0.7%	±3.5%
Highway	251	±1.2%	±6.3%
Ferry	310	±1.1%	±5.8%
International Air	171	±1.5%	±7.6%
Main Trip Purpose			
Vacation/Pleasure	510	±0.9%	±4.5%
Visiting Friends and Relatives	277	±1.1%	±5.9%
Business and Pleasure	147	±1.6%	±8.2%
Business Only	508	±0.9%	±4.5%
Seasonal Work	66	±2.5%	±12.9%

Most *RAS* questions are "multiple choice" questions, allowing the respondent to choose one of many alternatives. Therefore, more survey results are likely to be smaller percents than 50% where the maximum margin of error occurs. In other words, *RAS* results will more likely be subject to the Minimum Margins of Error in the table above than to the Maximum.

Acknowledgments

The *Random Arrival Survey* and the Arrival Count phases of the *Alaska Visitors Statistics Program* rely a great deal on the cooperation and good will of many people and organizations involved in the Alaska visitors industry. We would like to thank the following for their assistance:

- The management, air and ground crews of the Domestic Air carriers serving Alaska: Alaska Airlines, Delta Airlines, United Airlines, Northwest Airlines, Hawaiian Airlines, Hawaiian Vacations/Rich International, Morris Air, Sun Country, Continental and MarkAir;
- The management and ground crews serving the International Air carriers, and the Development Specialist office at the Anchorage International Airport;
- The Alaska Marine Highway System management and on-board personnel;
- The U.S. Customs Service personnel at Alcan and Skagway.

Survey Instruments

Following this section is a compilation of the *RAS* used during the face to face interviews.

STATE OF ALASKA 1993-94 RANDOM ARRIVAL SURVEY

1. ARE YOU A VISITOR TO ALASKA? (PLEASE CIRCLE NUMBER)
 1. NO THE SURVEY IS FOR VISITORS ONLY. PLEASE CIRCLE "1" AND RETURN THIS QUESTIONNAIRE TO THE PERSON WHO GAVE IT TO YOU. THANK YOU.
 2. YES (CONTINUE)
2. IS THIS THE FIRST STOP IN ALASKA FOR YOU? (CIRCLE NUMBER)
 1. NO THE SURVEY IS FOR VISITORS AT THEIR FIRST POINT OF ENTRY ONLY. PLEASE CIRCLE "1" AND RETURN THIS QUESTIONNAIRE TO THE PERSON WHO GAVE IT TO YOU. THANK YOU.
 2. YES (CONTINUE)
3. WHICH OF THESE CATEGORIES BEST DESCRIBES THE MAIN PURPOSE OF THIS ALASKA TRIP?
(CIRCLE ONE NUMBER ONLY IN FIRST COLUMN)
 1. BUSINESS ONLY
 2. BUSINESS AND PLEASURE.....WILL YOU ADD DAYS BEYOND THE BUSINESS PORTION OF YOUR TRIP TO ACCOMMODATE PLEASURE ACTIVITIES?
 1. YES
 2. NO
 3. DON'T KNOW/NOT SURE

.....WILL YOU ALSO BE VISITING FRIENDS/RELATIVES?

 1. YES
 2. NO
 3. DON'T KNOW/NOT SURE
 3. VACATION/PLEASURE.....WILL YOU ALSO BE VISITING FRIENDS/RELATIVES?
 1. YES
 2. NO
 3. DON'T KNOW/NOT SURE
 4. VISITING FRIENDS OR RELATIVES.....WILL YOU:
 1. SIGHTSEE ONLY IN THE LOCAL AREA IN WHICH YOUR FRIENDS OR RELATIVES LIVE, OR
 2. ALSO SIGHTSEE IN OTHER AREAS OF ALASKA?
 5. SEASONAL/PIPELINE WORKER
4. HOW MANY NIGHTS DO YOU PLAN TO SPEND IN ALASKA ON THIS TRIP?
(RECORD NUMBER BELOW. IF NONE, RECORD "0")
_____ # OF NIGHTS (ESTIMATE: ____YES ____NO)
5. WHAT MODE OF TRANSPORTATION WILL YOU USE WHEN YOU CROSS THE ALASKA STATE LINE LEAVING ALASKA ON THIS TRIP? (CIRCLE NUMBER)
 1. AIR TO USA
 2. AIR TO FOREIGN DESTINATION
 3. COMMERCIAL CRUISE SHIP
 4. ALASKA STATE FERRY
 5. HIGHWAY.....WILL YOU BE TAKING YOUR VEHICLE ONTO A FERRY WHEN YOU LEAVE ALASKA?
 1. NO
 2. YES

.....WHICH TYPE OF VEHICLE WILL YOU BE USING?

1. AUTO	3. MOTORCOACH
2. CAMPER/RV	4. OTHER _____

 6. COMMERCIAL BOAT/FREIGHTER
 7. PRIVATE BOAT
 8. MILITARY BOAT
 9. DON'T KNOW/NOT SURE
6. WHICH TYPE OF TRAVEL BEST DESCRIBES THIS TRIP? (CIRCLE NUMBER)
 1. ON A PACKAGED TRIP
 2. COMPLETELY ON OWN
 3. COMPLETELY ON OWN BUT WILL PURCHASE SIGHTSEEING TRIPS WHILE HERE

PACKAGED TRIP - WHEN YOU HAVE LODGING AND TRANSPORTATION AND/OR SIGHTSEEING PREARRANGED AND YOU PAY A SINGLE PRICE IN ADVANCE
7. INCLUDING YOURSELF, HOW MANY ARE TRAVELING IN YOUR IMMEDIATE PARTY SHARING EXPENSES SUCH AS FOOD, LODGING OR LOCAL TRANSPORTATION?
_____ NO. IN PARTY

7. INCLUDING YOURSELF, HOW MANY ARE TRAVELING IN YOUR IMMEDIATE PARTY SHARING EXPENSES SUCH AS FOOD, LODGING OR LOCAL TRANSPORTATION?
_____ NO. IN PARTY
8. WHAT ARE THE AGES AND SEX OF THESE (NUMBER ANSWER TO Q. 7) PEOPLE? (RECORD NUMBERS IN SPACES)

	MALE	FEMALE
UNDER 18	_____	_____
18 - 24	_____	_____
25 - 34	_____	_____
35 - 44	_____	_____
45 - 54	_____	_____
55 - 64	_____	_____
65 - 74	_____	_____
75 AND OLDER	_____	_____

9. WHAT IS THEIR EMPLOYMENT STATUS? (RECORD NUMBERS IN SPACES BELOW)

	MALE	FEMALE
EMPLOYED	_____	_____
RETIRED	_____	_____
OTHER	_____	_____

10. IN THE LAST FIVE YEARS, HOW MANY OTHER TRIPS HAVE YOU MADE TO ALASKA FOR PLEASURE?
FOR BUSINESS?

FOR PLEASURE _____ # OF TRIPS FOR BUSINESS _____ # OF TRIPS

THESE ARE ALL THE QUESTIONS WE HAVE FOR YOU TODAY. FOR THIS SURVEY RESEARCH PROJECT TO BE COMPLETE, WE WOULD LIKE TO BE ABLE TO ASK YOU ABOUT YOUR TRIP AFTER YOU RETURN HOME. YOUR NAME AND ADDRESS WILL BE KEPT CONFIDENTIAL AND UTILIZED SOLELY FOR THE PURPOSE OF THIS SURVEY. THE STATE OF ALASKA THANKS YOU.

NAME: _____

FULL STREET ADDRESS: _____

CITY/STATE/PROVINCE: _____

COUNTRY: _____

ZIP CODE: _____

AGAIN, THANK YOU VERY MUCH FOR YOUR HELP. WE HOPE YOUR STAY IN ALASKA IS PLEASANT AND REWARDING!

COMMENTS: _____

FOR INTERVIEWER/OFFICE USE ONLY

DATE: ____/____/____ INTERVIEWER #: _____

LOCATION: 1 KIN 2 JNU 3 ANC 4 FAI 5 SGY 6 POKER 7 ALCAN

MODE: 1 Domestic Air 2 International Air 3 Cruise-Walk 4 Cruise-Tour
5 Ferry-PR 6 Ferry-Bel 7 Hwy-PV

SAMPLES: Flight No. _____
Domestic Air: 1 AS 2 BP 3 CO 4 DL 5 HA 6 NW 7 UA 8 Other _____

Intl Air: 1 AS 2 BALAIR 3 CI 4 DL 5 JAZ 6 KE 7 SU 8 Other _____

Cruise: 01 Nieuw-Amster 02 Noordam 03 Rotterdam 04 Westerdam
05 Crown Princ 06 Dawn Princ 07 Gold Princ 08 Fair Princ
09 Regal Princ 10 Sky Princ 11 Star Princ 12 Regent Sea
13 Regent Star 14 Costa Rive 15 Nord Princ 16 Gold Odyssey
17 Sagafjord 18 Universe

Ferry: 1 Taku 2 Aurora 3 Malaspina 4 Matanuska 5 Columbia

Hwy: 1 Auto 2 Camper/RV 3 Other

STATE OF ALASKA 1993-94 RANDOM ARRIVAL SURVEY

1. ARE YOU A VISITOR TO ALASKA? (PLEASE CIRCLE NUMBER)
 1. NO THE SURVEY IS FOR VISITORS ONLY. PLEASE CIRCLE "1" AND RETURN THIS QUESTIONNAIRE TO THE PERSON WHO GAVE IT TO YOU. THANK YOU.
 2. YES (CONTINUE)
- 2A. DID YOU ENTER ALASKA WITH YOUR VEHICLE ON A FERRY? (CIRCLE NUMBER)
 1. YES THE SURVEY IS FOR VISITORS AT THEIR FIRST POINT OF ENTRY ONLY. PLEASE CIRCLE "1" AND RETURN THIS QUESTIONNAIRE TO THE PERSON WHO GAVE IT TO YOU. THANK YOU.
 2. NO (CONTINUE)
- 2B. DID YOU ENTER ALASKA BY ROAD AT HAINES, SKAGWAY OR HYDER? (CIRCLE NUMBER)
 1. YES THE SURVEY IS FOR VISITORS AT THEIR FIRST POINT OF ENTRY ONLY. PLEASE CIRCLE "1" AND RETURN THIS QUESTIONNAIRE TO THE PERSON WHO GAVE IT TO YOU. THANK YOU.
 2. NO (CONTINUE)
3. WHICH OF THESE CATEGORIES BEST DESCRIBES THE MAIN PURPOSE OF THIS ALASKA TRIP? (CIRCLE ONE NUMBER ONLY IN FIRST COLUMN)
 1. BUSINESS ONLY
 2. BUSINESS AND PLEASURE.....WILL YOU ADD DAYS BEYOND THE BUSINESS PORTION OF YOUR TRIP TO ACCOMMODATE PLEASURE ACTIVITIES?
 1. YES
 2. NO
 3. DON'T KNOW/NOT SURE
 -WILL YOU ALSO BE VISITING FRIENDS/RELATIVES?
 1. YES
 2. NO
 3. DON'T KNOW/NOT SURE
 3. VACATION/PLEASURE.....WILL YOU ALSO BE VISITING FRIENDS/RELATIVES?
 1. YES
 2. NO
 3. DON'T KNOW/NOT SURE
 4. VISITING FRIENDS OR RELATIVES.....WILL YOU:
 1. SIGHTSEE ONLY IN THE LOCAL AREA IN WHICH YOUR FRIENDS OR RELATIVES LIVE, OR
 2. ALSO SIGHTSEE IN OTHER AREAS OF ALASKA?
 5. SEASONAL/PIPELINE WORKER
4. HOW MANY NIGHTS DO YOU PLAN TO SPEND IN ALASKA ON THIS TRIP? (RECORD NUMBER BELOW. IF NONE, RECORD "0")

_____ # OF NIGHTS (ESTIMATE: ____ YES ____ NO)
5. WHAT MODE OF TRANSPORTATION WILL YOU USE WHEN YOU CROSS THE ALASKA STATE LINE LEAVING ALASKA ON THIS TRIP? (CIRCLE NUMBER)
 1. AIR TO USA
 2. AIR TO FOREIGN DESTINATION
 3. COMMERCIAL CRUISE SHIP
 4. ALASKA STATE FERRY
 5. HIGHWAY.....WILL YOU BE TAKING YOUR VEHICLE ONTO A FERRY WHEN YOU LEAVE ALASKA?
 1. NO
 2. YES
 -WHICH TYPE OF VEHICLE WILL YOU BE USING?
 1. AUTO
 2. CAMPER/RV
 3. MOTORCOACH
 4. OTHER _____
 6. COMMERCIAL BOAT/FREIGHTER
 7. PRIVATE BOAT
 8. MILITARY BOAT
 9. DON'T KNOW/NOT SURE
6. WHICH TYPE OF TRAVEL BEST DESCRIBES THIS TRIP? (CIRCLE NUMBER)
 1. ON A PACKAGED TRIP
 2. COMPLETELY ON OWN
 3. COMPLETELY ON OWN BUT WILL PURCHASE SIGHTSEEING TRIPS WHILE HERE

"PACKAGED TRIP" - WHEN YOU HAVE LODGING AND TRANSPORTATION AND/OR SIGHTSEEING PREARRANGED AND YOU PAY A SINGLE PRICE IN ADVANCE

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UNDER 18	_____	_____
18 - 24	_____	_____
25 - 34	_____	_____
35 - 44	_____	_____
45 - 54	_____	_____
55 - 64	_____	_____
65 - 74	_____	_____
75 AND OLDER	_____	_____

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	MALE	FEMALE
EMPLOYED	_____	_____
RETIRED	_____	_____
OTHER	_____	_____

10. IN THE LAST FIVE YEARS, HOW MANY OTHER TRIPS HAVE YOU MADE TO ALASKA FOR PLEASURE?
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FOR PLEASURE _____ # OF TRIPS FOR BUSINESS _____ # OF TRIPS

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NAME: _____

FULL STREET ADDRESS: _____

CITY /STATE/PROVINCE: _____

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ZIP CODE: _____

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COMMENTS: _____

FOR INTERVIEWER/OFFICE USE ONLY

DATE: ____/____/____ INTERVIEWER #: _____

LOCATION: 1 KTN 2 JNU 3 ANC 4 FAI 5 SGY 6 POKER 7 ALCAN

MODE: 1 Domestic Air 2 International Air 3 Cruise-Walk 4 Cruise-Tour
5 Ferry-PR 6 Ferry-Bel 7 Hwy-PV

SAMPLES: Flight No. _____

Domestic Air: 1 AS 2 BF 3 CO 4 DL 5 HA 6 NW 7 UA 8 Other _____

Intl Air: 1 AS 2 BALAIR 3 CI 4 DL 5 JAZ 6 KE 7 SU 8 Other _____

Cruise: 01 Nieuw-Amster 02 Noordam 03 Rotterdam 04 Westerdam
05 Crown Princ 06 Dawn Princ 07 Gold Princ 08 Fair Princ
09 Regal Princ 10 Sky Princ 11 Star Princ 12 Regent Sea
13 Regent Star 14 Costa Rive 15 Nord Princ 16 Gold Odyssey
17 Sagafjord 18 Universe

Ferry: 1 Taku 2 Aurora 3 Malaspina 4 Matanuska 5 Columbia

Hwy: 1 Auto 2 Camper/RV 3 Other